



# Leadville & Lake County Tourism Research

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## Objectives

- **The main objectives of the proposed research for Lake County are to identify:**
  1. **Trends in consumer travel and tourism** that are directly relevant to Colorado and Lake County;
  2. **Among Colorado's leisure travelers, the relative popularity of leading vacation and leisure travel destinations** within the State;
  3. **Targetable consumer segments** within Recreation, Heritage, and other potential tourism segments that should be actively pursued in future tourism marketing;
  4. **Immediate, shorter-term opportunities to drive increased tourism** to existing events, attractions, and facilities already established in Leadville and Lake County;
  5. **How controllable barriers to leisure travel within Lake County should be addressed;** and
  6. **Future measurements that Lake County can use to evaluate its investments and returns in tourism marketing.**
- **In taking a more holistic approach to this research, CORE Insights is also addressing:**
  - **Opportunities to focus and improve Lake County's main visitation themes, images, and communications in future advertising and promotions**
  - **Local events, activities or facilities that can potentially be introduced or added to drive additional leisure visits longer-term**
  - **Potential improvements in the [www.visitleadvilleco.com](http://www.visitleadvilleco.com) and other websites potential visitors access including content, key navigational elements, and links**

## Specifications

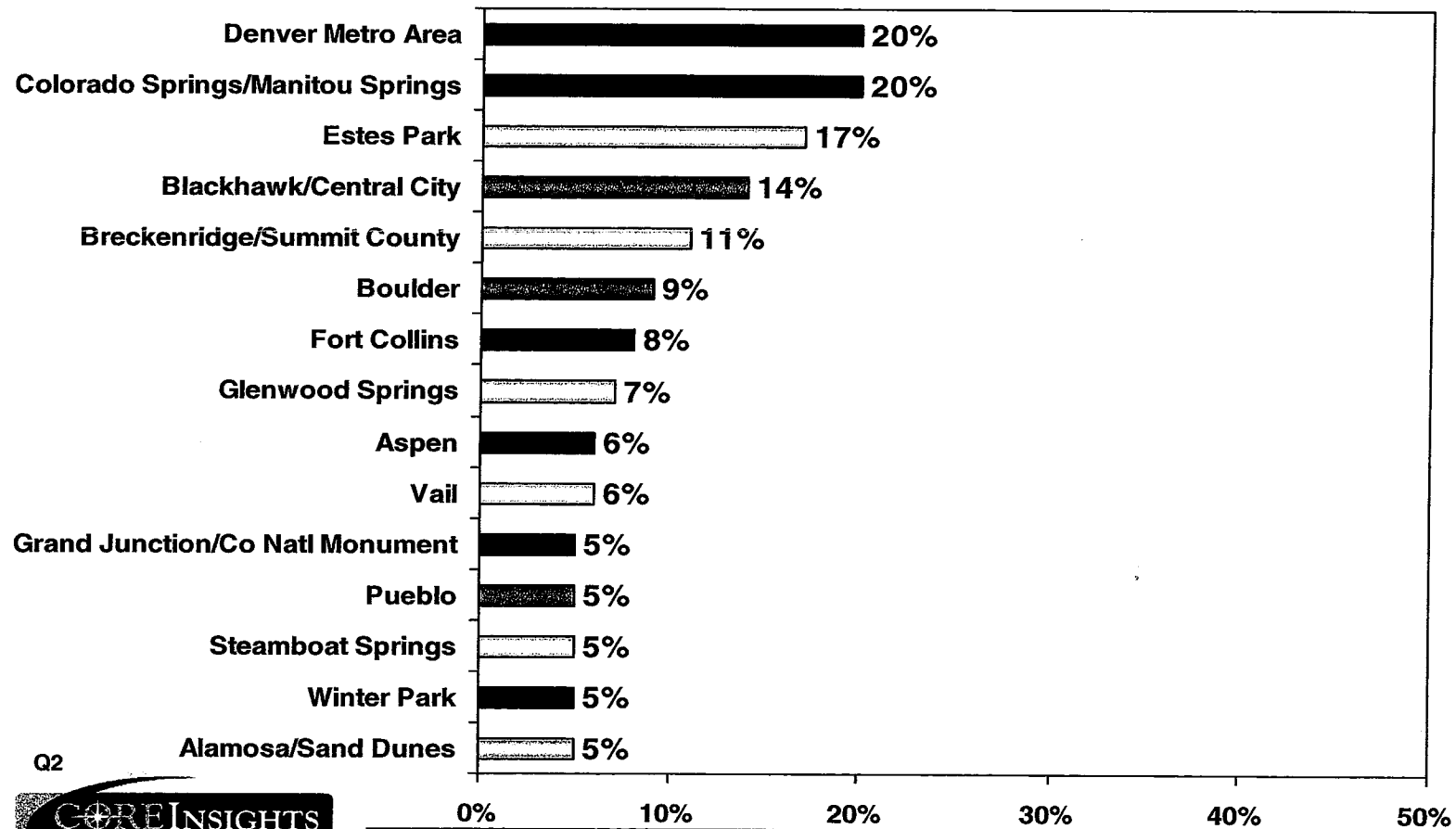
- Four research methods were used to meet the objectives:
  1. A secondary data review of key travel and tourism trends relevant to Lake County;
  2. In-depth one-on-one Delphi interviews among eight individuals with specific knowledge regarding local tourism, local attractions, facilities, events, and amenities currently available to visitors - providing background to CORE Insights for interpreting the survey results and making recommendations;
  3. A random online survey among 355 Coloradans who reported taking at least one overnight leisure trip within Colorado in the prior twelve months; and
  4. Follow-up, one-on-one CORE interviews among a mix of twenty survey respondents, in order to gather additional, more in-depth knowledge about perceptions about Lake County and factors that are most likely to increase visitation to Leadville and Lake County for future leisure trips.
- The survey was conducted in May and June 2011, with follow-up interviews in August
  - Since survey participants were asked to provide details about their most recent overnight trip within Colorado, both Spring and early Summer activities and destinations were well-represented in the results - but respondents were also asked about participation and interest in a wide range of Fall and Winter activities as well, both in general and with specific reference to Lake County activities
  - The sample of 355 has a maximum margin or error of +5.2%, at a 95% confidence level
- While the secondary data review is provided separately, this report summarizes results from the survey and the follow-up, one-on-one CORE interviews
- Results for individual survey questions are rounded to the nearest whole percentage, for ease of interpretation



# Survey Results

## Destination for Most Recent Leisure Trip

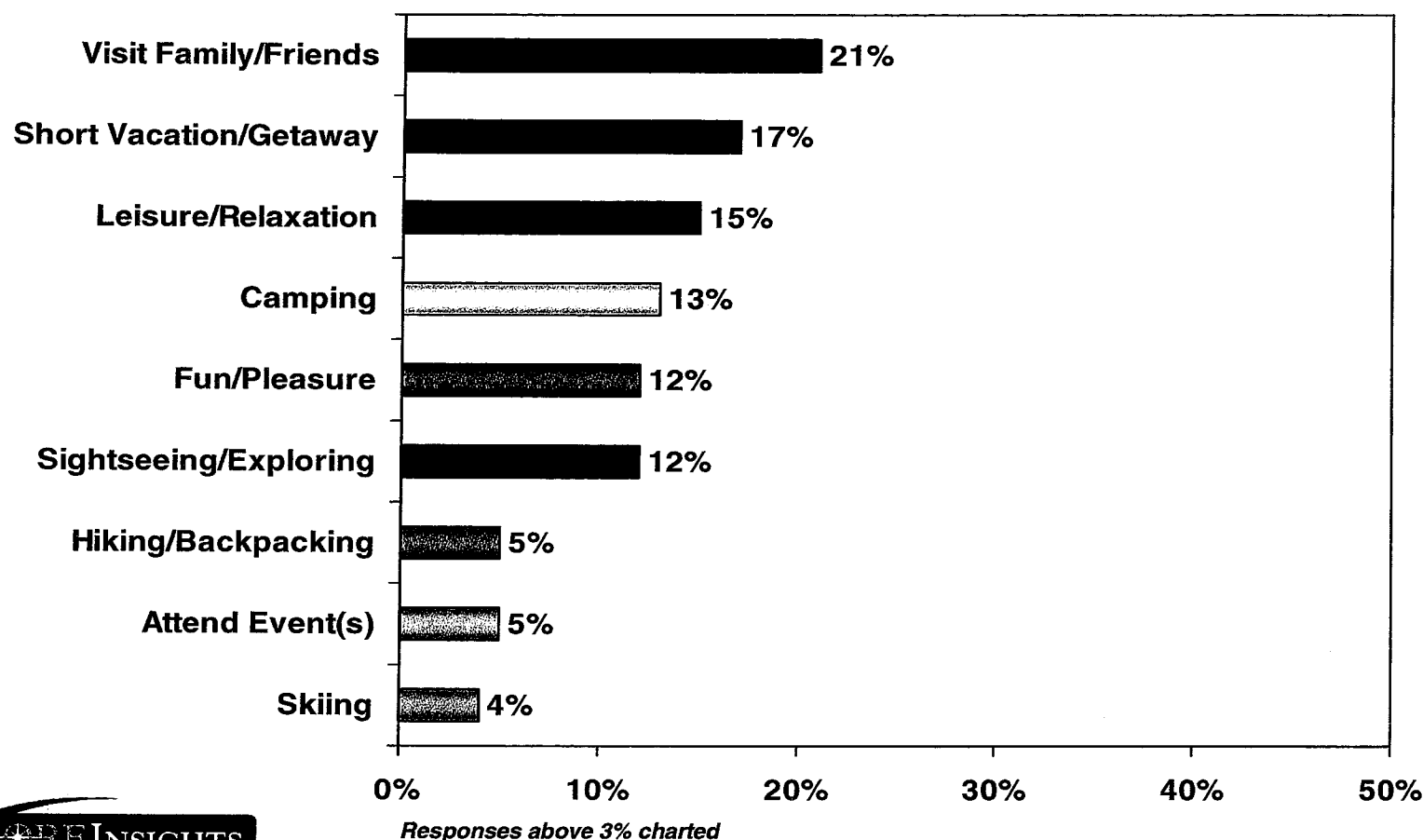
- The top leisure destinations that Lake County competes with most directly for Summer and Spring trips are Estes Park, Blackhawk/Central City, Summit County, and Glenwood Springs
  - Leisure visitation in Lake County is quite different compared to visiting the Denver, Colorado Springs, Boulder, and Fort Collins metro areas - all are well-developed urban markets visited for a variety of reasons
  - Envisioning leisure travelers *with an interest in visiting Estes Park, Summit County, or Glenwood Springs* is a useful frame of reference for Lake County because there is greater potential to attract them, given Lake County's features, activities available, and its locale



Q2

## Main Purpose For Most Recent Leisure Trip

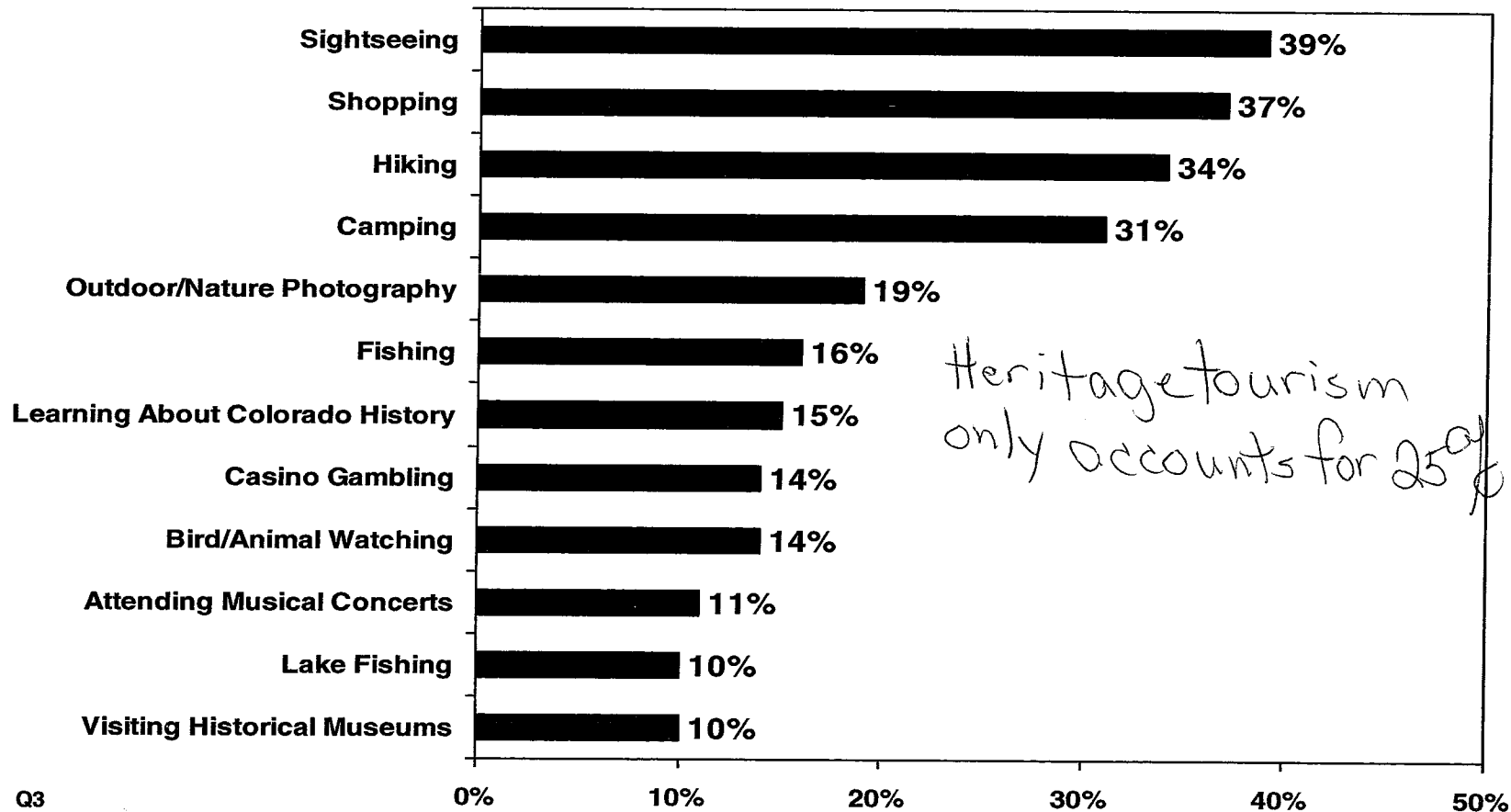
- “Visiting family and friends” is the most frequently-stated purpose for leisure trips in Colorado, but such trips are typically made to large cities and the suburbs, not places like Lake County
- Lake County can be an attractive destination among the much larger majority of travelers (78%) who are taking trips for a short vacation getaway, for relaxation, “just for fun,” for sightseeing or for specific types of recreation such as camping, hiking, or skiing



Q2a

## Leading Activities on Most Recent Leisure Trip

- Leisure travelers engage in a wide variety of activities on their leisure trips - *with Lake County and Leadville offering virtually all the types of activities they enjoy the most*
  - The notable exceptions are casino gambling and shopping (to a degree) - visitors can shop for antiques, collectables, decorative items, and books about local history, but not for an assortment of more contemporary merchandise, such as clothing

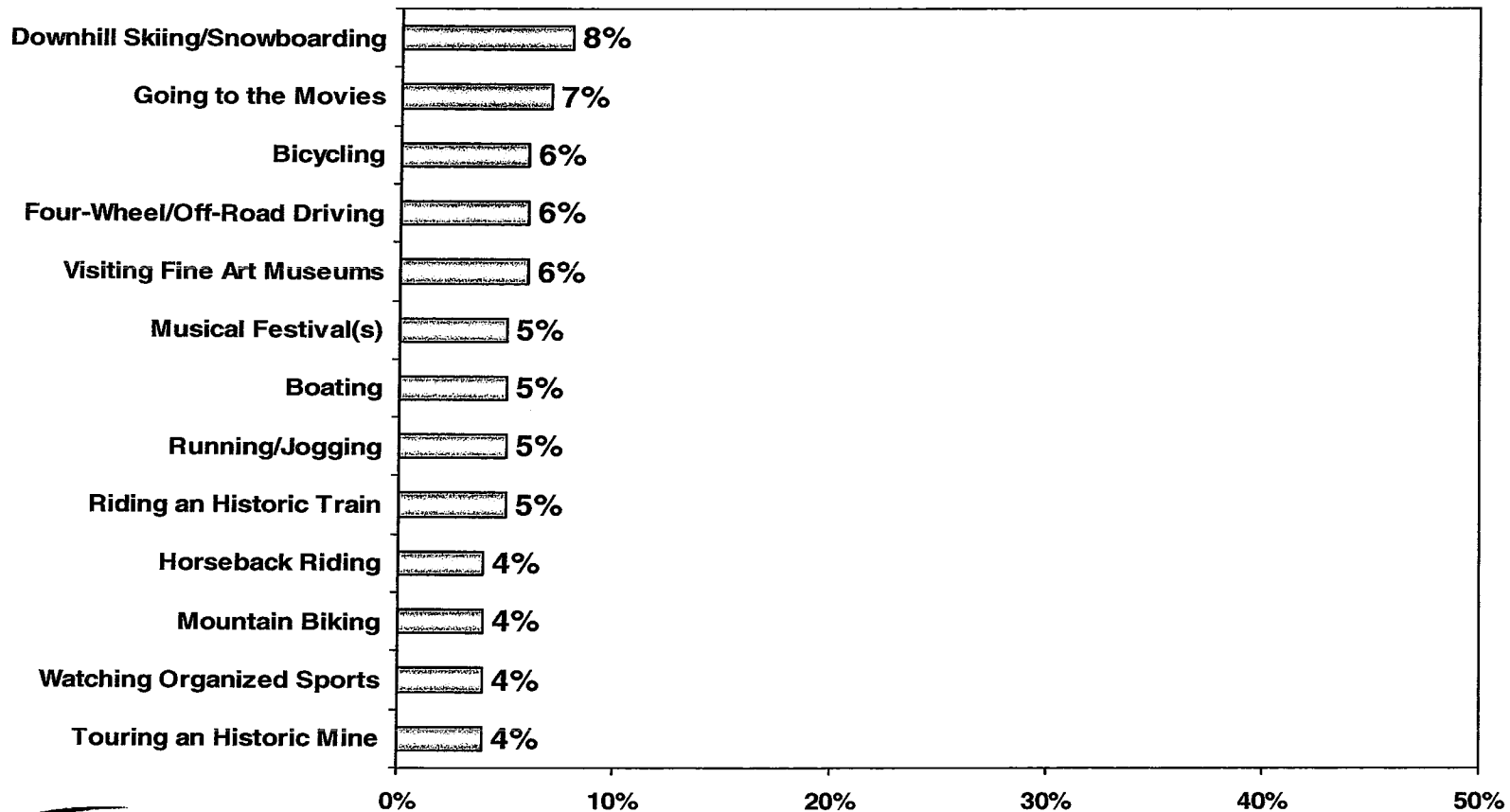


Q3



## Other Activities on Most Recent Leisure Trip

- Other, less frequent activities should not be overlooked, especially when they are the *main basis* for making a trip - such as skiing or attending musical concerts or festivals
- The availability of several other lower-incidence activities can make or break the decision to visit one destination over another, especially when spouses and families have varied interests
  - For instance, the ability to go mountain biking and to a movie nearby could make one location more attractive, or the combination of local hiking and off-road driving, and touring an historic mine

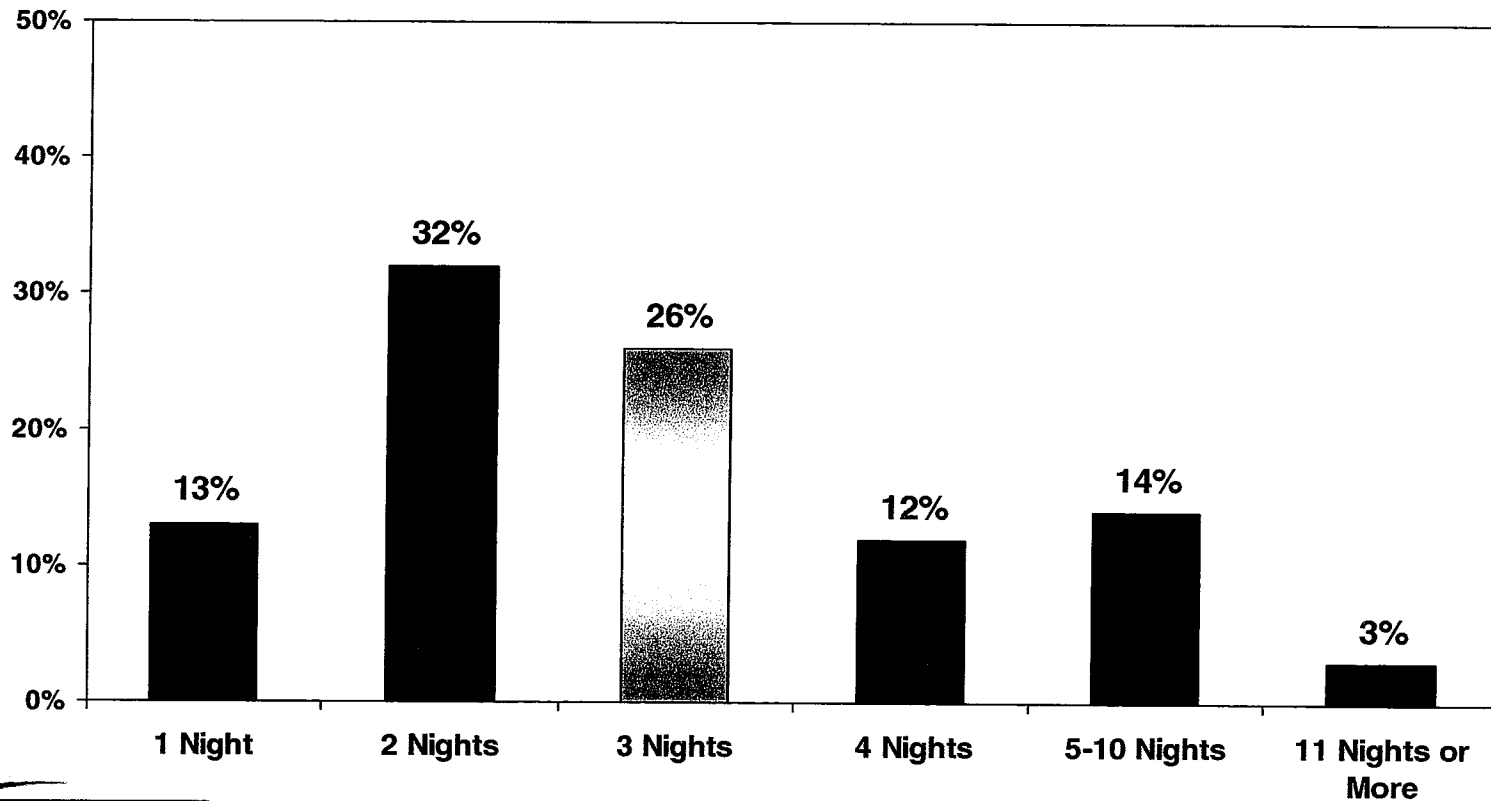


Q3

Responses 4% to 8% only.

## Duration of Overnight Leisure Trip

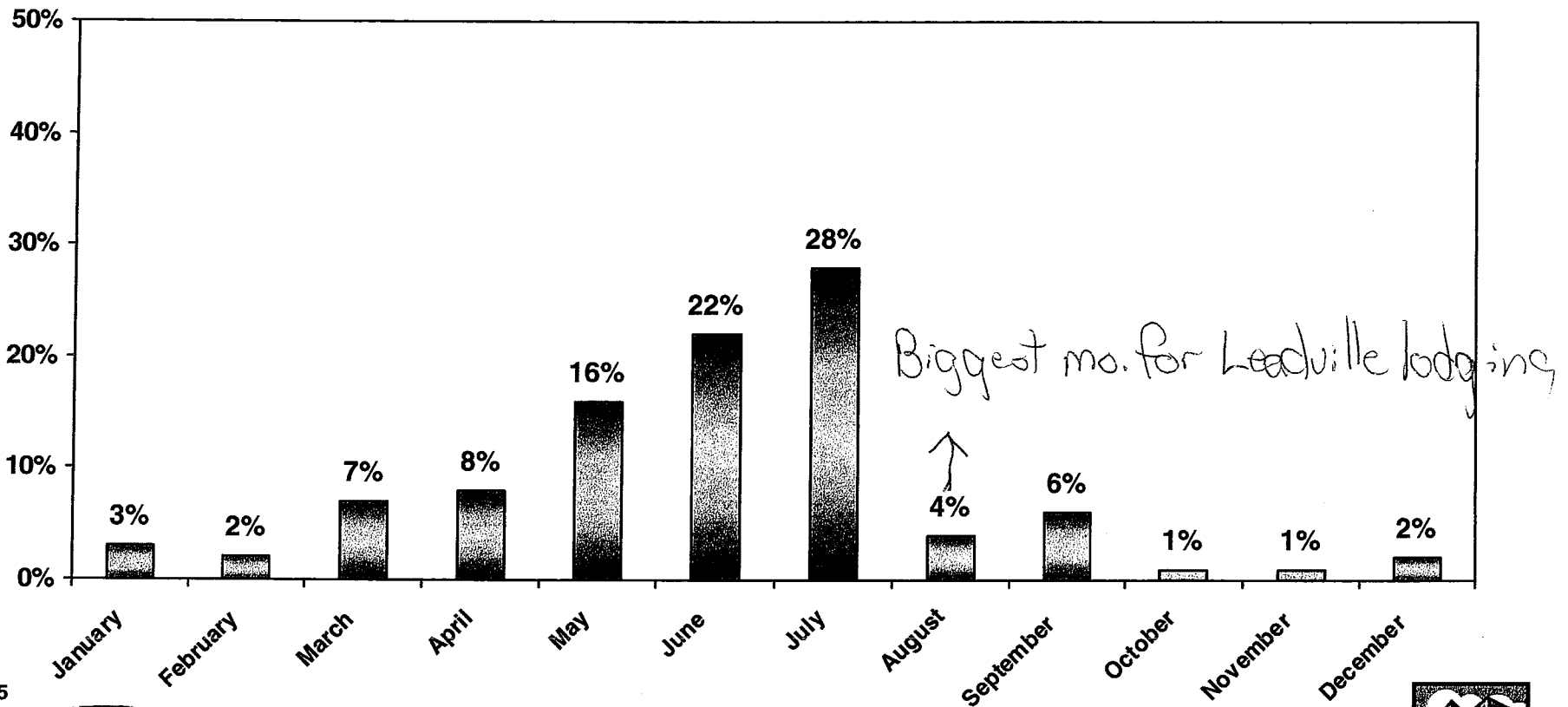
- Colorado's leisure travelers typically limit their stays to two or three nights, most often over weekends or "long weekends" - which should be considered Lake County's *primary* target
  - While more than one-fourth (29%) stay for four nights or more, this likely includes consumers who have their own vacation property (or vacation shares), and others who travel to more distant destinations
- While this research documented trips among Colorado's leisure travelers staying overnight, Lake County should also be targeting the many "day-trippers" who enjoy getting away to the mountains just for a day, *as this can function as an entre for making subsequent visits*



Q4

## Month of Most Recent Overnight Trip

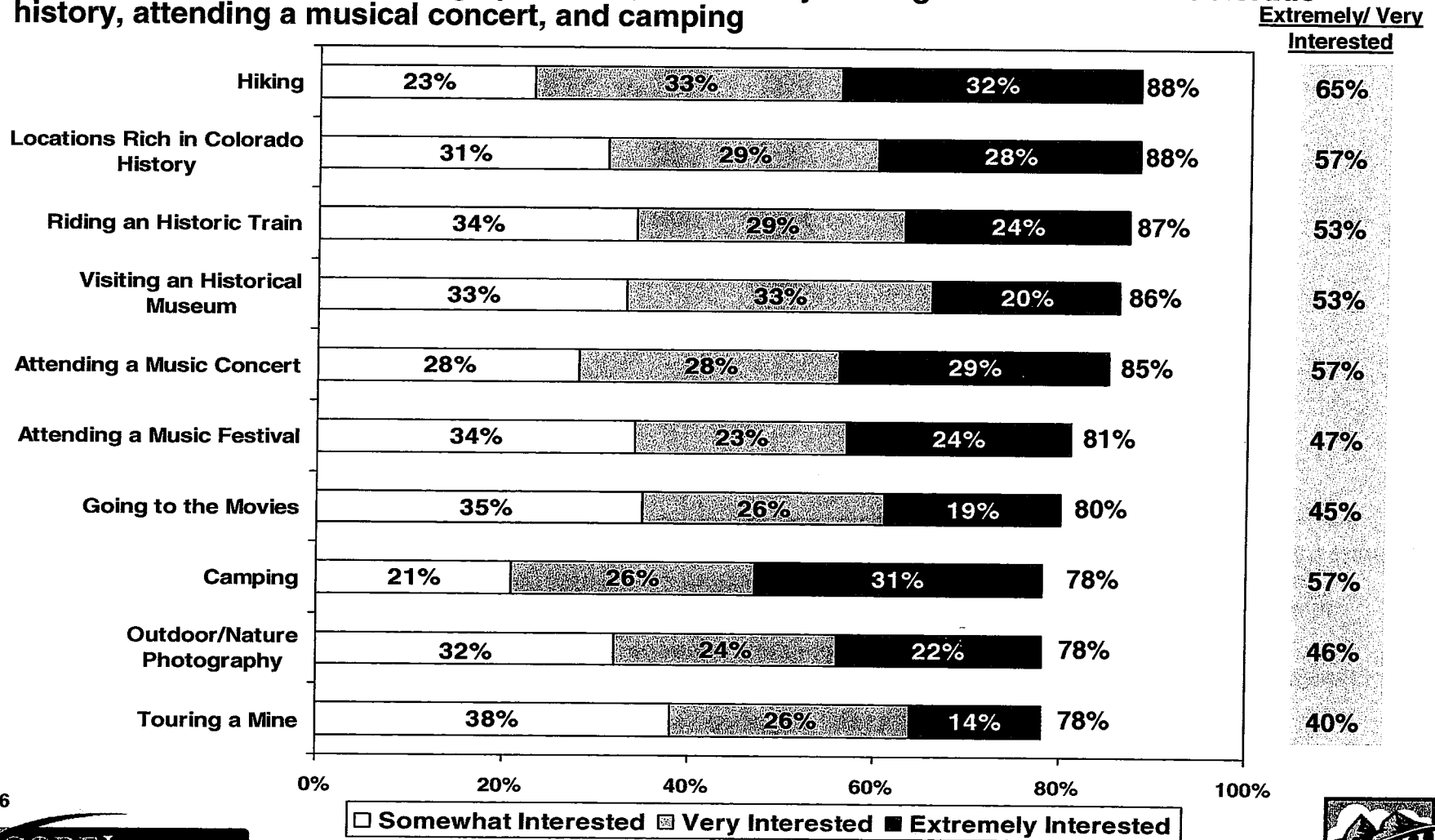
- Results confirmed that the large majority of survey respondents documented leisure trips recently taken in the Spring and early Summer months, up to August 2011
  - Conducting this survey in March or April would have highlighted many more leisure trips for mainstream Winter activities such as downhill skiing and cross-country skiing
  - Research conducted during or just after the Winter months would also document less common Winter activities such as snowshoeing, dogsledding, snowmobiling, ice climbing, skating, sledding, and ice fishing - *which also need to be featured in future, seasonal tourism marketing and publicity for Lake County*



Q5

## Interest in Leisure Trip Activities: The "Top 10" List

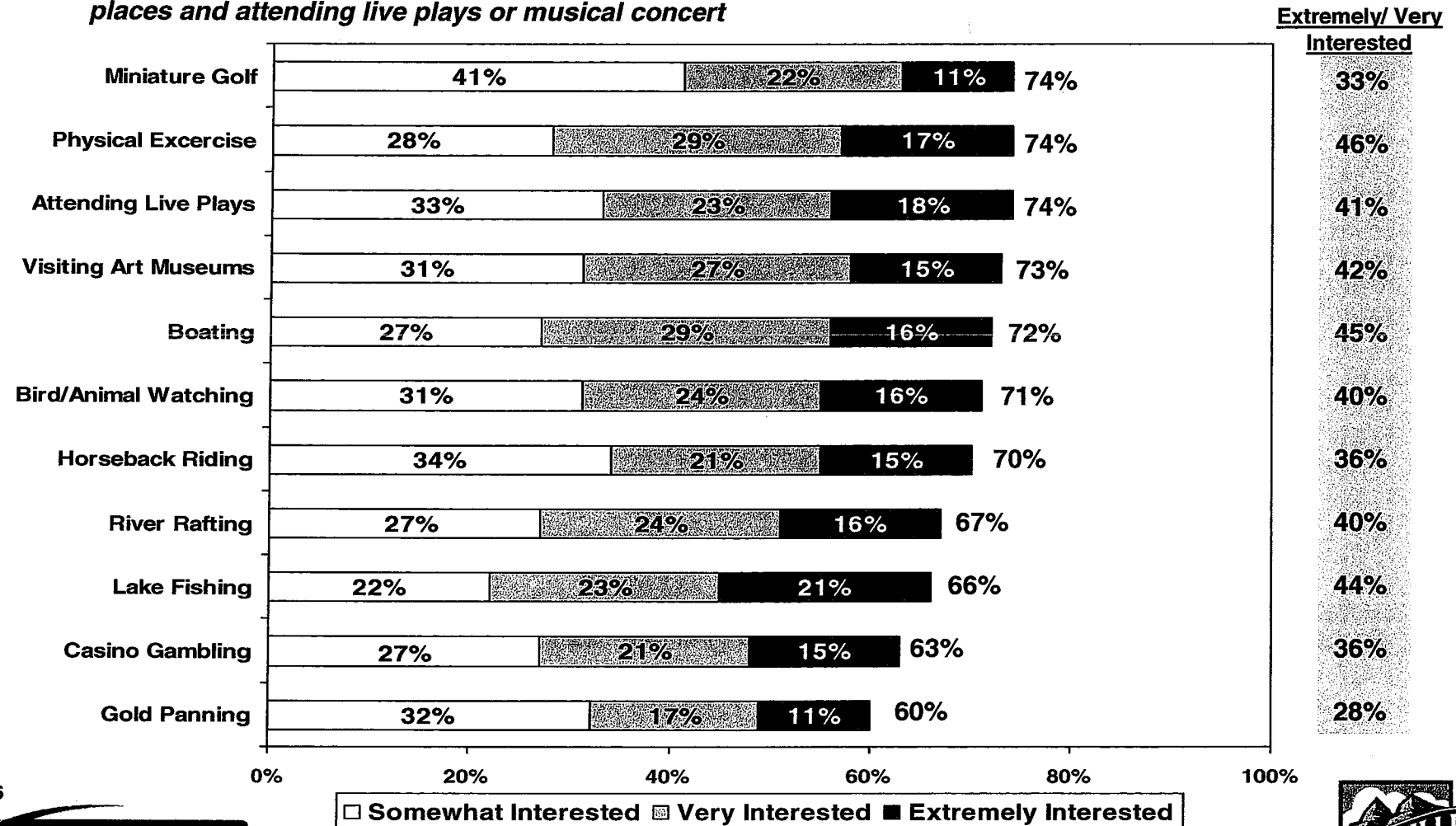
- A wide variety of activities are attractive to a majority of leisure travelers, but those generating the strongest interest (*very* or *extremely* interested) are the main reasons leisure travelers take their trips - with hiking heading up that list, followed by visiting locations rich in Colorado history, attending a musical concert, and camping



Q6

## Leisure Trip Activities "Moderate" in Interest

- Colorado's leisure travelers are interest in exercise *and* recreation as part of their trips
  - While sightseeing and shopping are their most frequent trip activities, *most of them are also looking for several forms of exercise and recreation such as hiking and camping, as well as exploring historic places and attending live plays or musical concert*



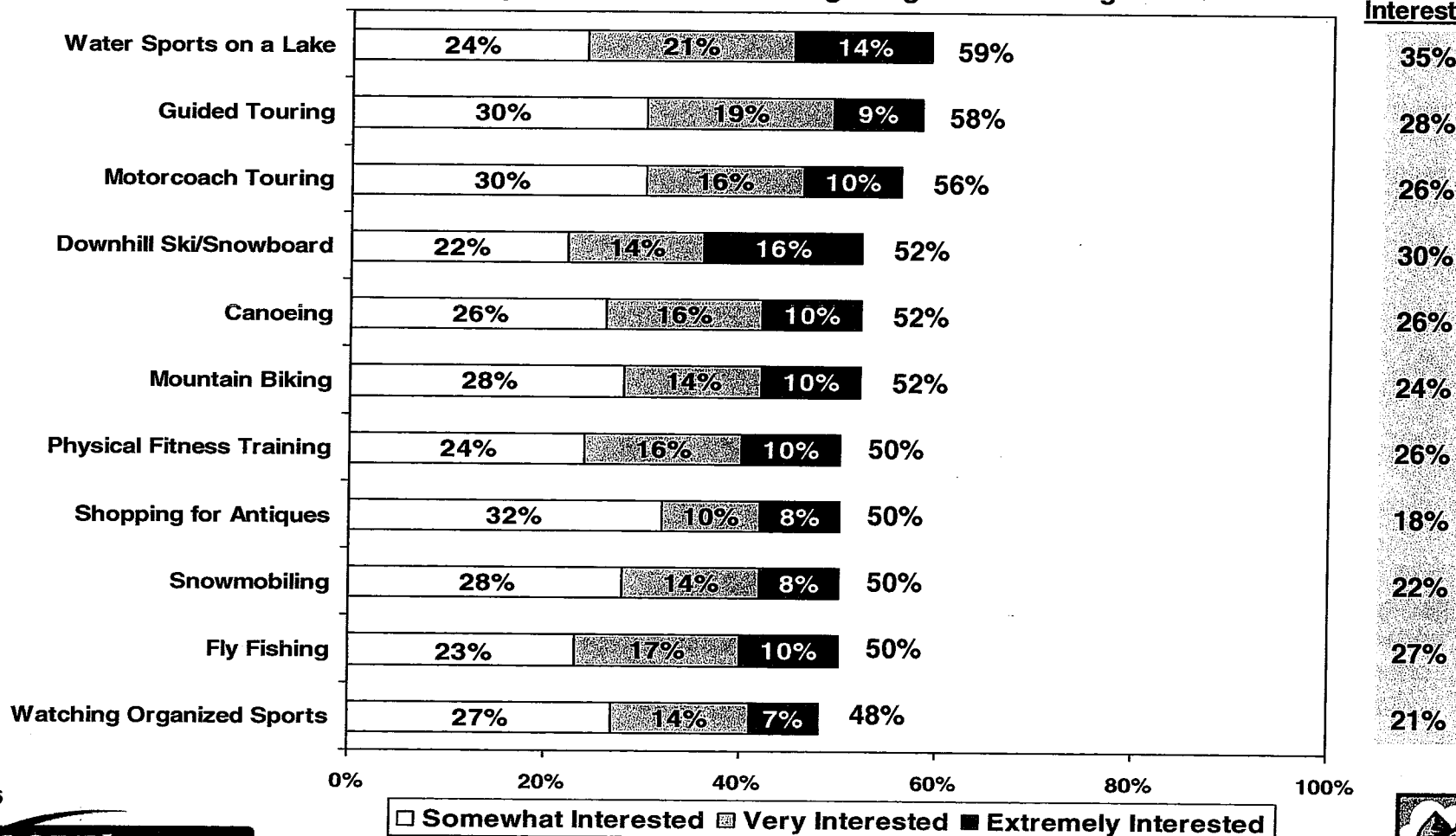
Q6

## Activities Lower in Interest, More Targeted/Seasonal

- Activities below - such as guided touring, skiing, canoeing, more serious physical fitness training and other activities - are simply *higher in interest among more specific, smaller subgroups of leisure travelers*

- While this is to be expected, they are best reached through targeted marketing efforts

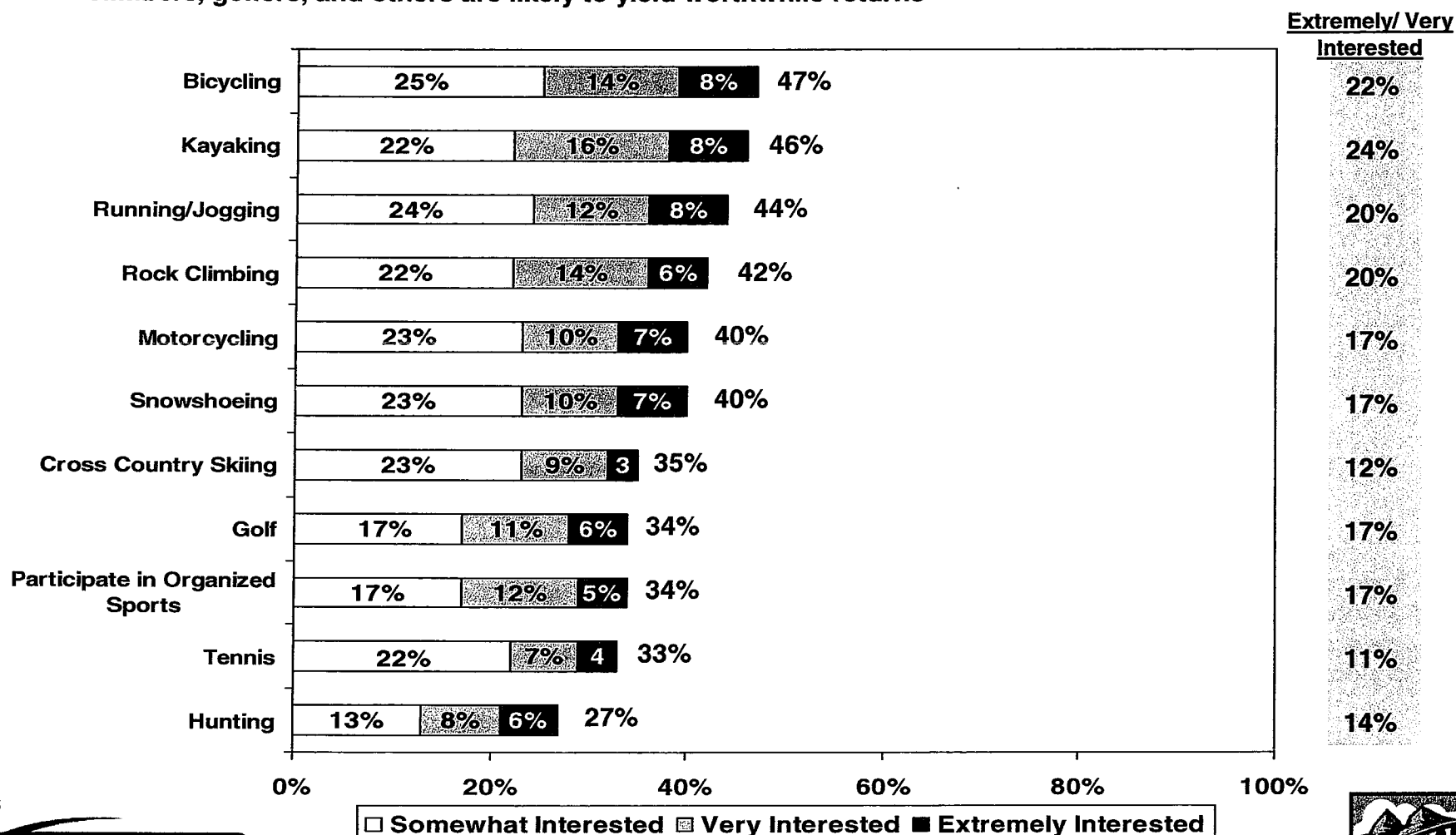
Extremely/ Very Interested



Q6

## Activities Lowest in Interest, Much More Targeted/Seasonal

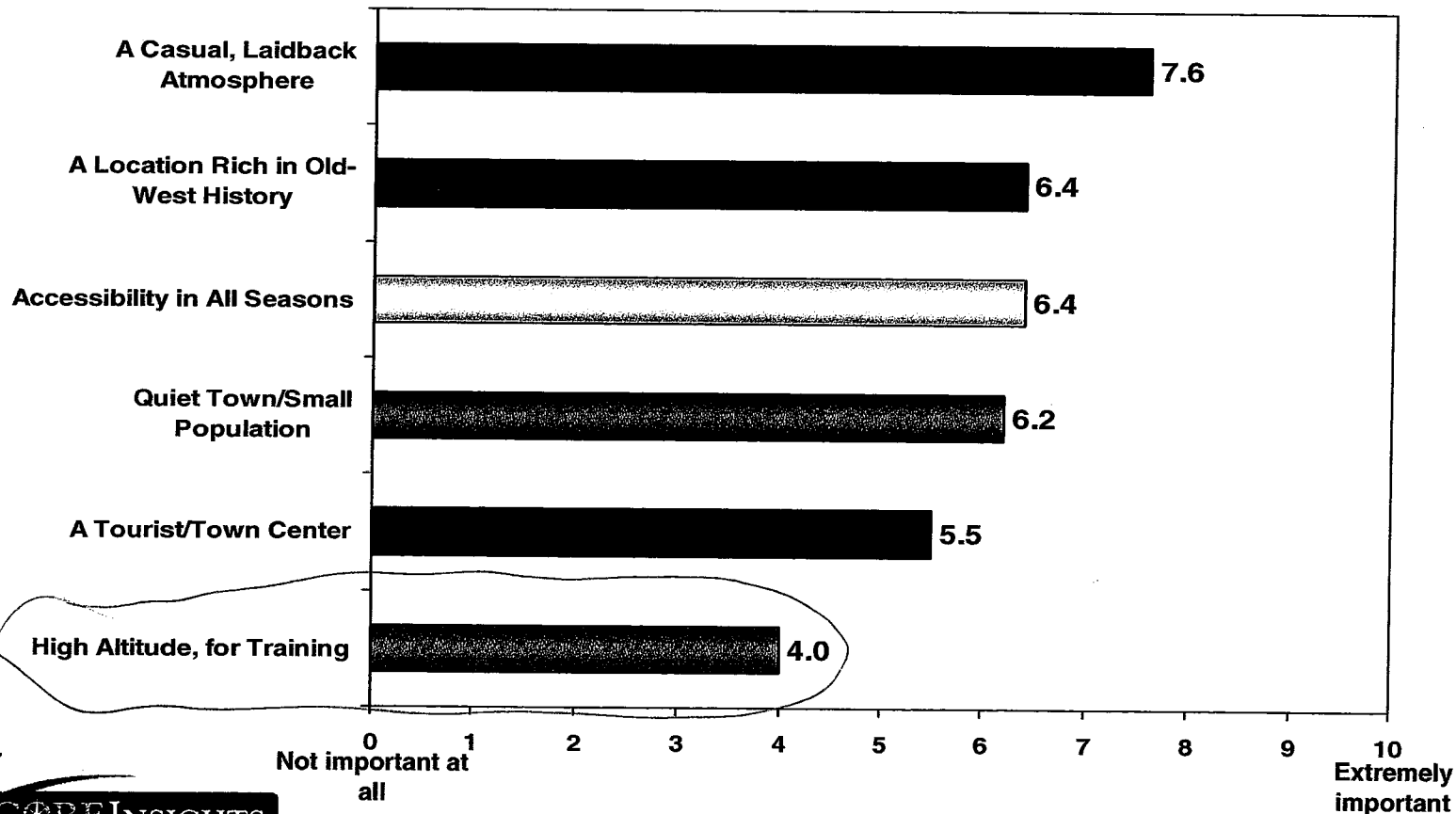
- A long list of additional activities appeal to smaller groups, including several seasonal activities
  - Opportunistic niche targeting and marketing efforts made to groups such as runners, bikers, kayakers, rock climbers, golfers, and others are likely to yield worthwhile returns



Q6

## Importance of Leisure Destination Setting/Feeling

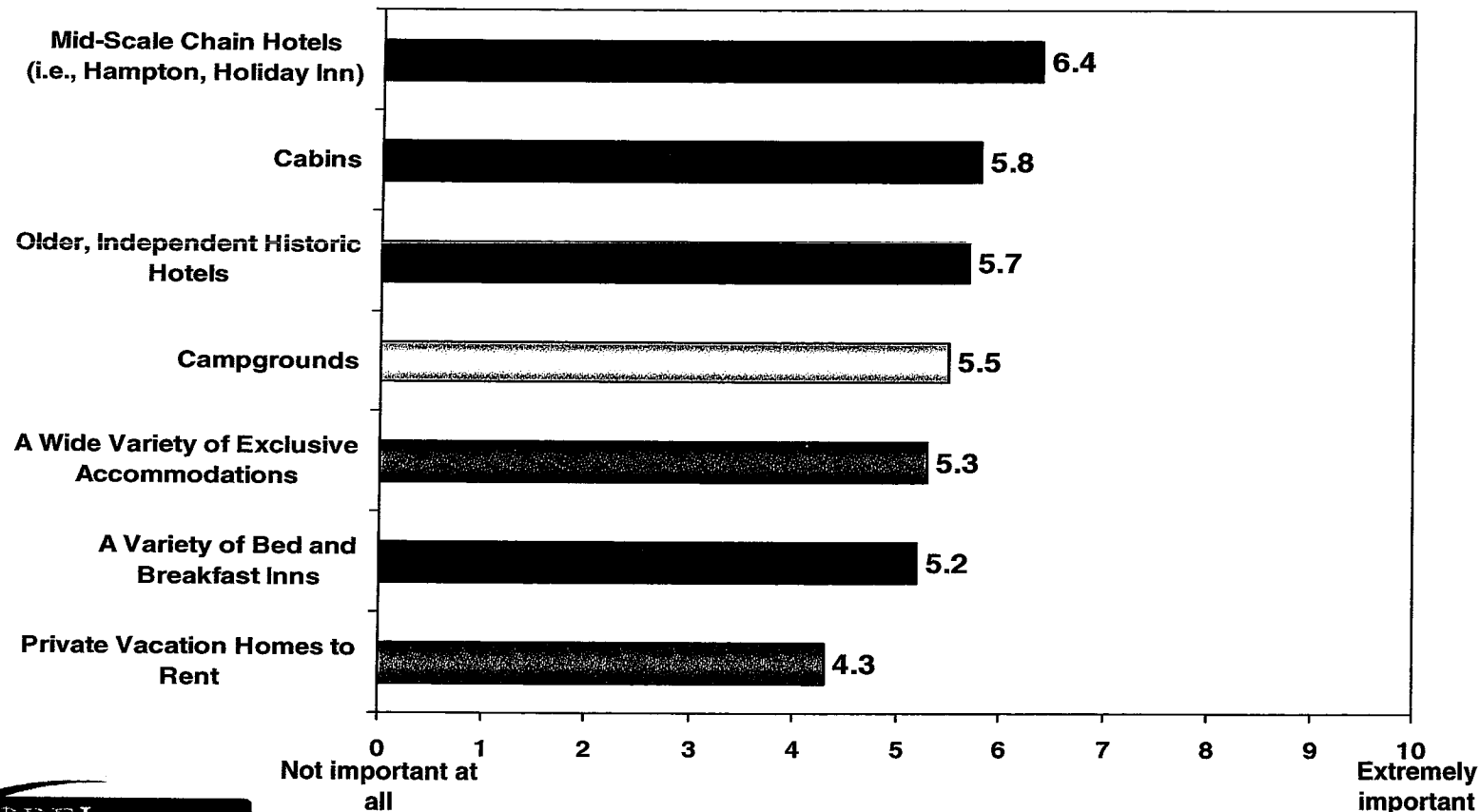
- The clear desire among leisure travelers to experience “a very casual, laidback atmosphere” can serve as a leading, compelling main reason to visit Leadville and Lake County
  - While Colorado’s leisure travelers are often purposeful - usually engaging in multiple activities as part of their trips - they are yearning for a backdrop that is *low-key, extremely relaxed, de-stressing, and reparative*
  - The setting and surroundings of Leadville and the County, creates the desirable milieu travelers are not as likely to experience in Breckenridge, Vail, Aspen, or Estes Park, which are often considered *too upscale, overdeveloped, too commercialized, or too busy* - often the antithesis of what travelers are seeking





## Relative Importance of Sleeping Options

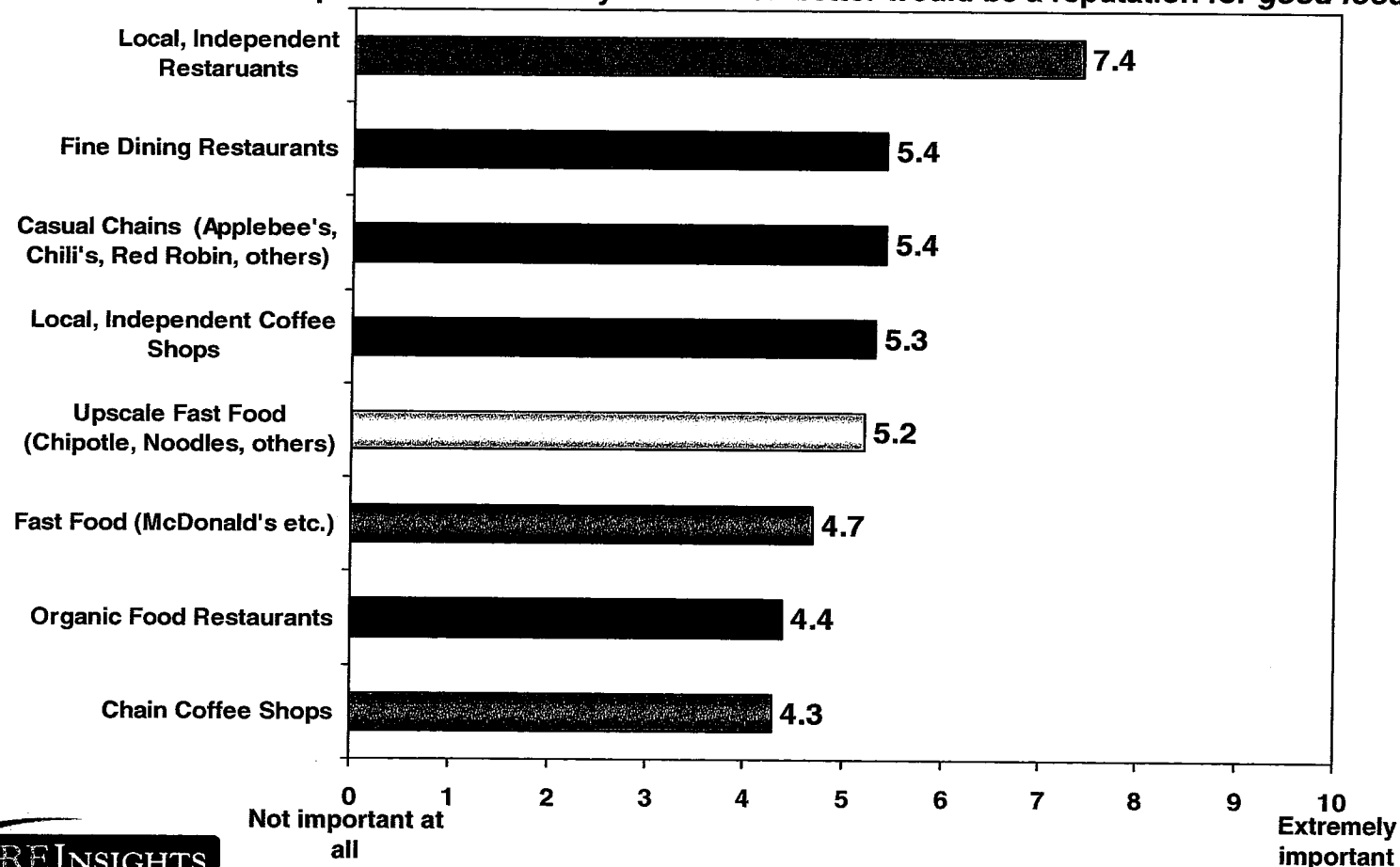
- Without specific reference to visiting Leadville or Lake County, leisure travelers clearly feel that the ability to choose among a variety of mid-scale chain hotels is important when making leisure travel plans
  - The most common desire among consumers in general is *having a very wide variety of choices available*
- While staying in “older, independent, historic hotels” is moderate in overall importance, it is attractive among the many leisure travelers who are motivated to experience history *and* those who are seeking a remarkably relaxing, casual, laidback experience



Q7

## Importance of Restaurants and Dining Choices

- Colorado's leisure travelers have a distinct, pronounced preference for experiencing unique, distinctive local restaurants when they travel, not the mass-market chains
  - This is yet another visitation factor that bodes well for Leadville
  - While potential travelers (and locals) would undoubtedly benefit from having a few additional local dining options available, travelers will be more attracted when they become aware of Leadville's independent restaurants and the specific cuisines they offer - even better would be a reputation for *good food and service*



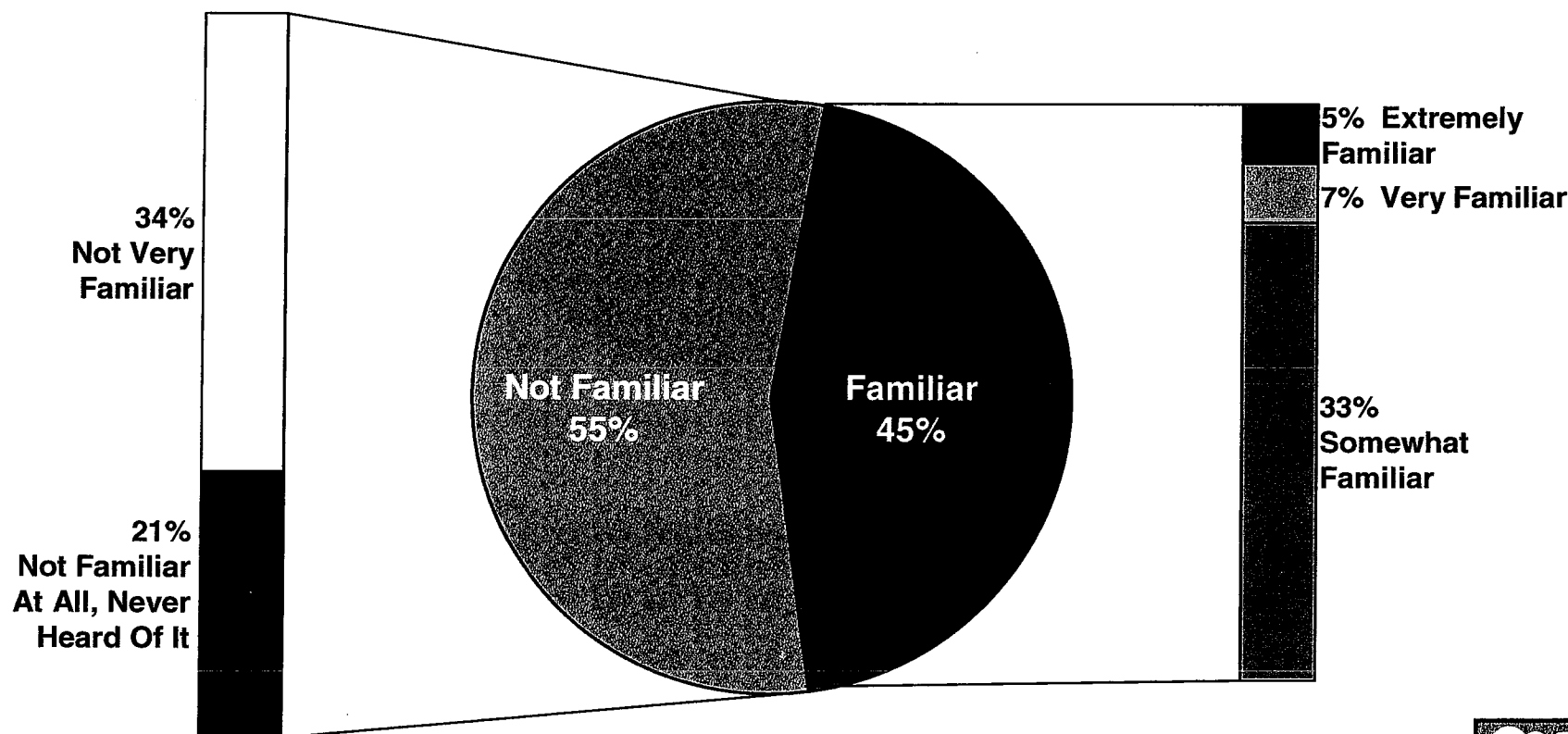
Q7

## Familiarity with *Lake County, Colorado*

19

*Would have been better to ask if they were familiar w/ Leadville*

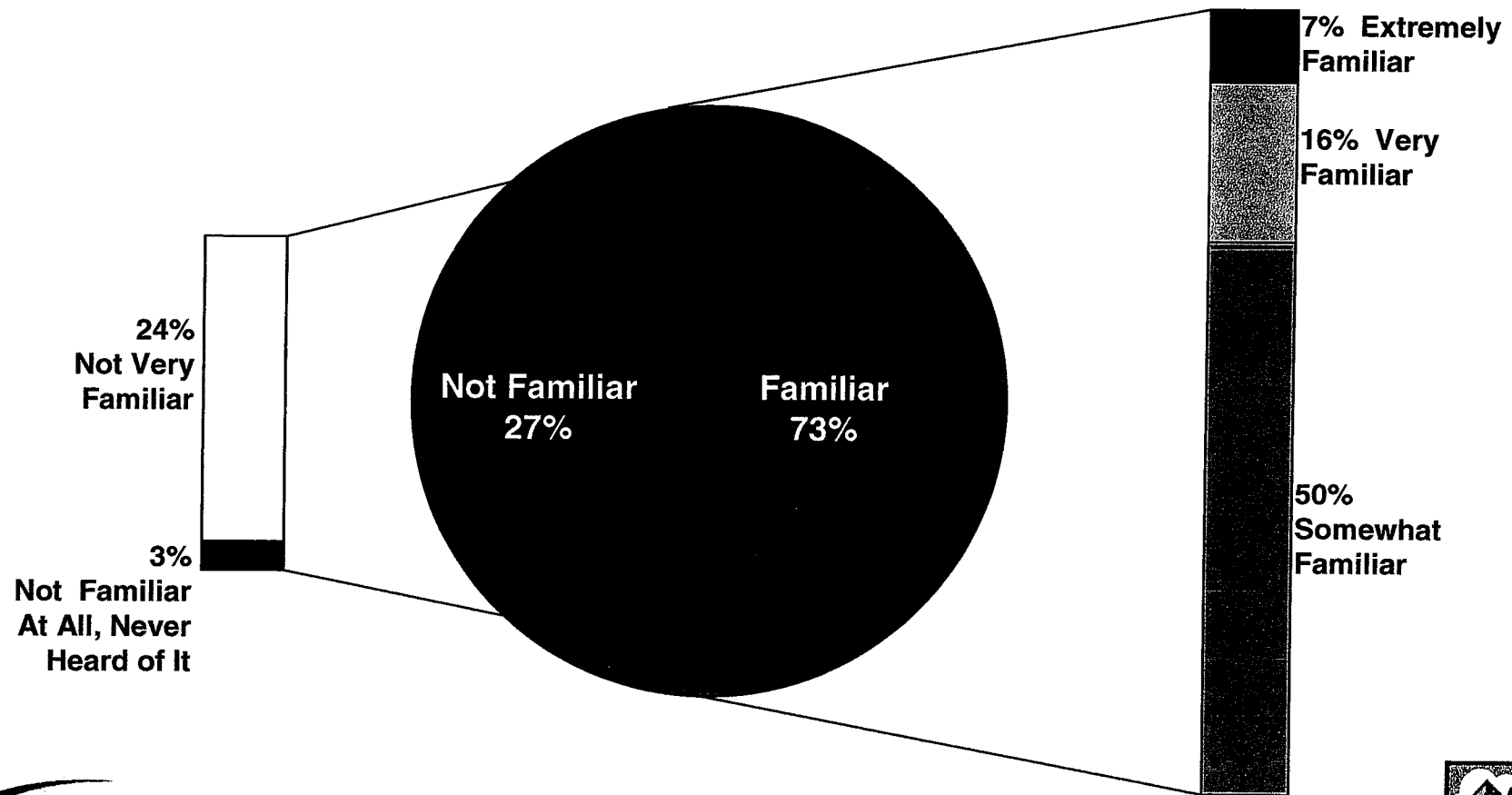
- Only a very small group of Colorado's leisure travelers are extremely or very familiar with Lake County (12%) - with a large majority completely unfamiliar or not very familiar
  - This is a clear indication that Lake County is seldom top-of-mind when leisure destinations are considered
- Most in the minority who are categorized as "familiar" with Lake County probably have scant knowledge about it, other than the name alone - which is unfortunate and a weakness, especially in comparison to Summit County, which likely has much better name recognition



Q8

## Familiarity with the *City of Leadville, Colorado*

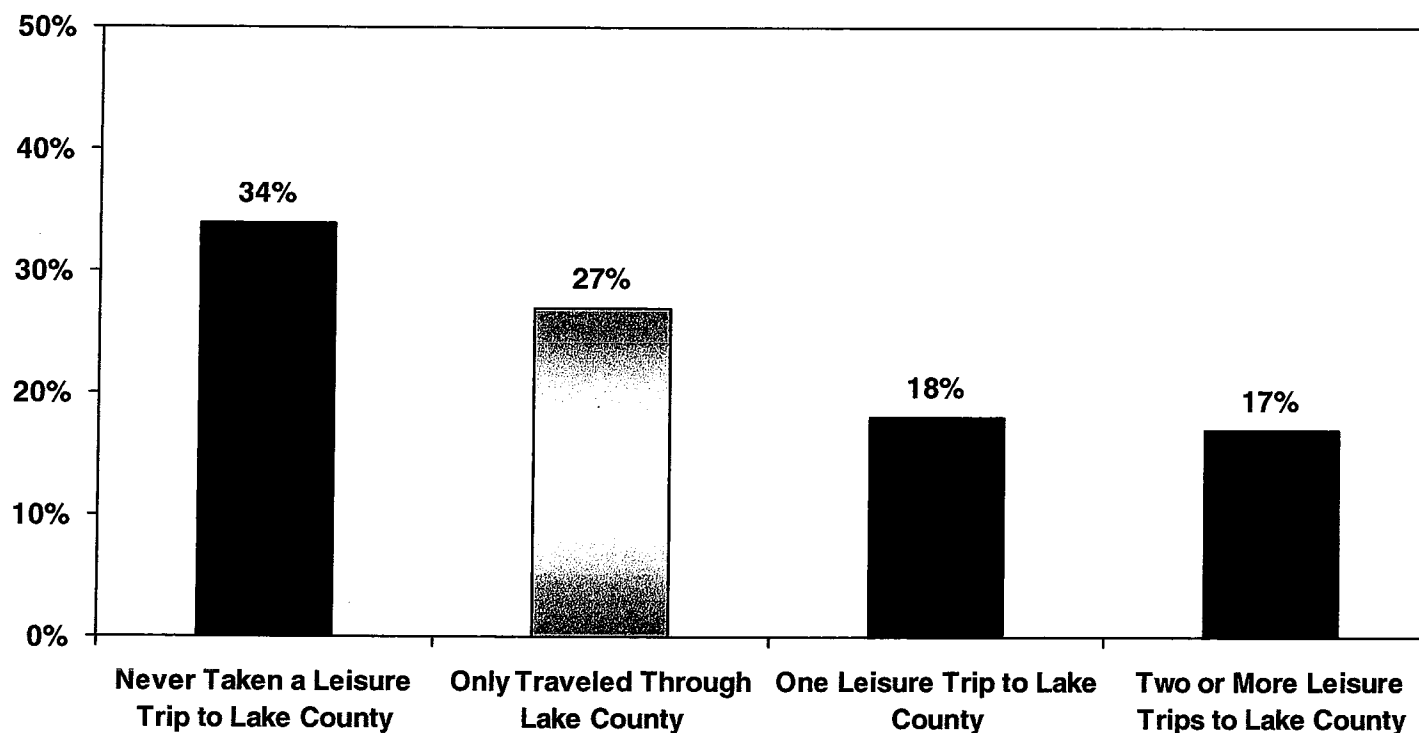
- Name recognition is significantly higher for Leadville than Lake County
  - In the near term, marketing communications with leisure travelers should begin with Leadville because it is more known, but should also include prominent mentions and explanations of Lake County in order to improve awareness and name recognition for Lake County *and* its additional amenities, attractions, and characteristics



Q9

## Lake County: Prior Leisure Trip Experience

- Well over half (61%) of Colorado's leisure travelers have never stopped in Lake County for one of their trips
  - Only a much smaller minority have taken either one or two trips to Lake County
  - Unfortunately, follow-up interviewing revealed that some travelers who reported making a single trip have "been there and done that" - expressing the feeling that they are not compelled to making future repeat visits
- Along with building basic awareness of Lake County, leisure travelers should be given ample reasons for making multiple trips *for multiple reasons* - and *in multiple seasons*



Q10

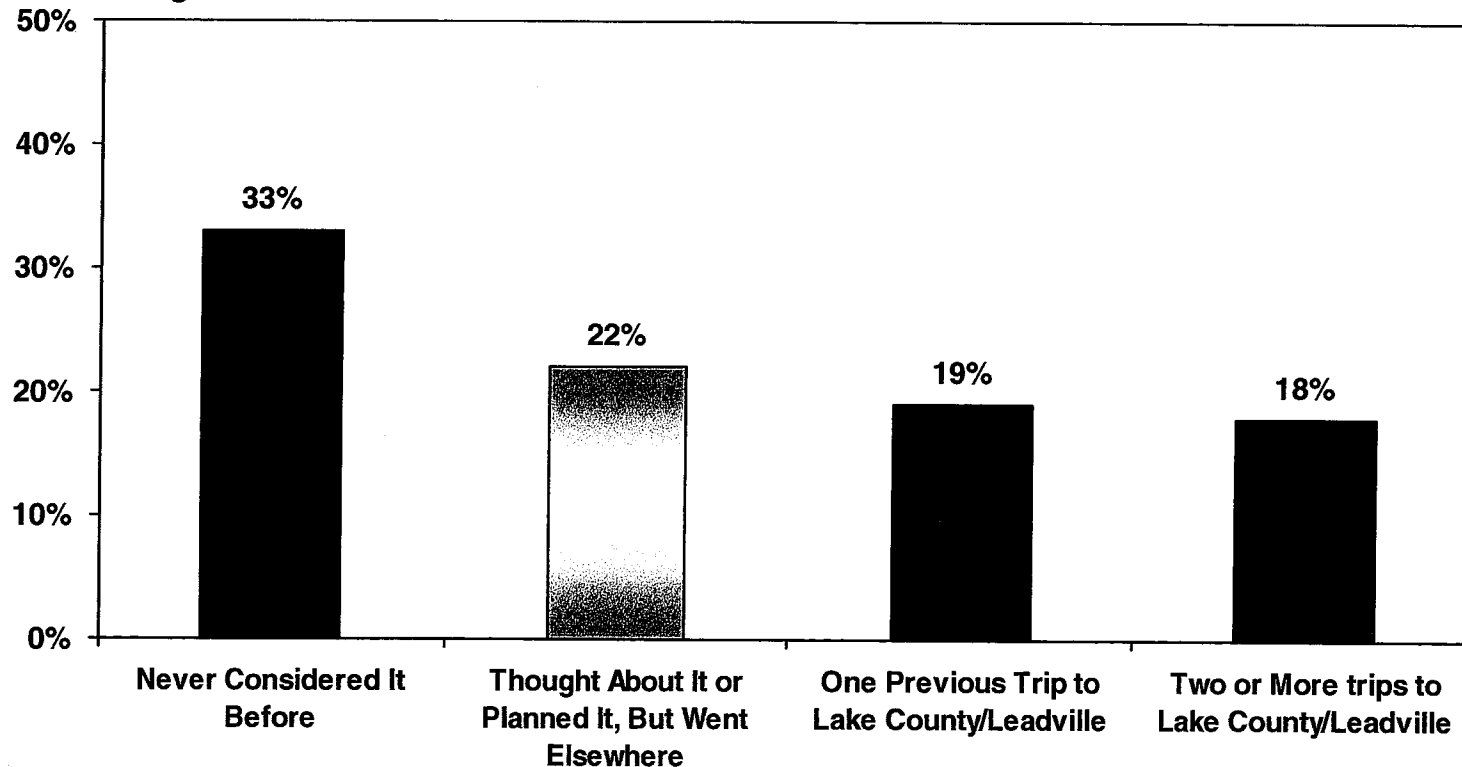


"Don't Know" response of 4% not charted.



## Degree of Consideration for a Lake County/Leadville Trip

- Most leisure travelers (55%) simply have not considered Lake County/Leadville (33%) - or thought about it but went elsewhere (22%)
  - Again, keeping the leading motivations for leisure travel in mind, Leadville and Lake County need to become increasingly known for the distinct set of characteristics they offer that are different and better than other destinations that compete with it
  - Future marketing should emphasize the laidback atmosphere, local special events and concerts, the altitude and scenery, the availability of interesting, historic hotels, independent restaurants, and the wide variety of recreational activities available throughout the year - all in close proximity to Colorado's Front Range



Q11



*"Don't Know" response of 8% not charted.*





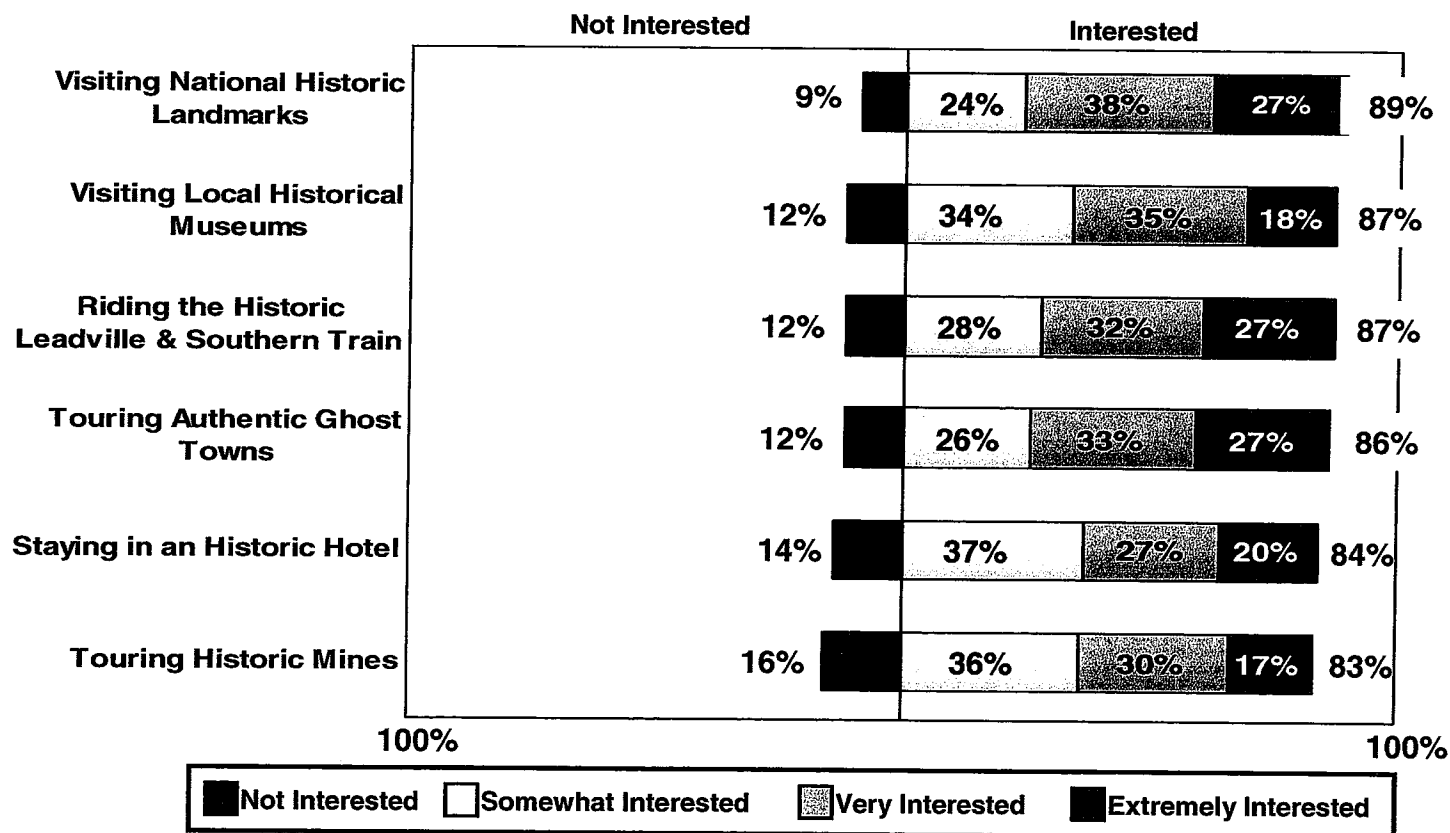
## **Interest in Leadville/Lake County Activities, Attractions, & Amenities**

**- Within Key Leisure Travel Categories\* -**

## Interest: History & Heritage Tourism

The stuff of  
~~history~~ Legends

- It is encouraging that a large majority of leisure travelers express a high level of overall interest in many local historic attractions
  - Not only is this important in generating *initial* visitation interest, it is critical in creating the desire to return for a second or third trip, in order to experience all the history there is to see
  - The largest and most popular historic attractions should continue to feature and promote new, different exhibits or offerings each year, to give previous visitors more reasons to return

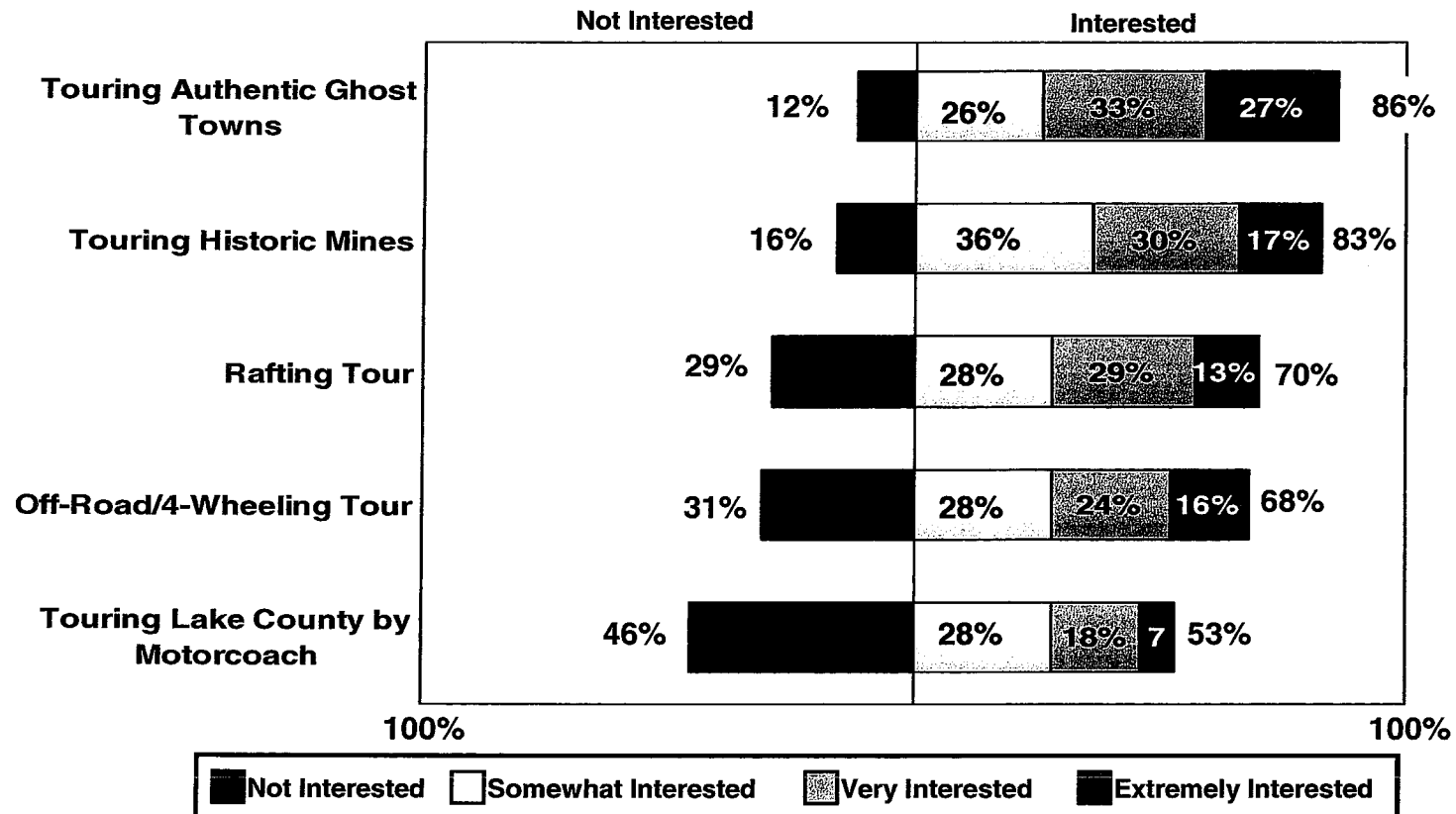


Q12



## Interest: Touring & Local Tours

- Larger groups of leisure travelers will be receptive to history-themed tours in Lake County than rafting or four-wheel drive tours
  - With Buena Vista more known for its river rafting tours, it is not advisable for this to be a focus of *Lake County's* travel marketing
  - Maps and routes for off-road driving should continue to be offered on Leadville and Lake County travel sites, but the level of consumer interest does not warrant a specialized business for that purpose alone



Q12

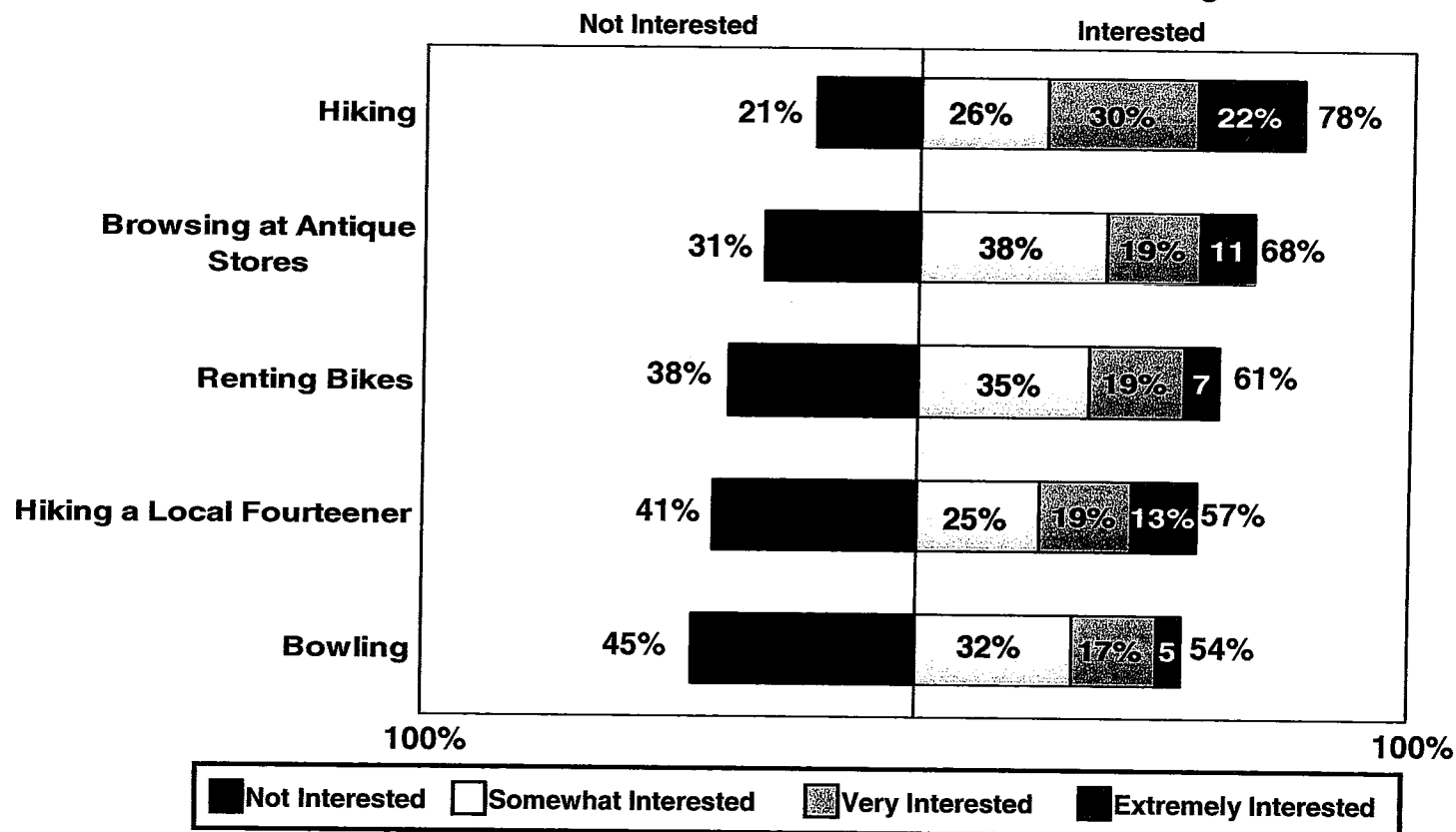


"Don't Know" responses not charted.



## Interest: Recreation & Casual Activities

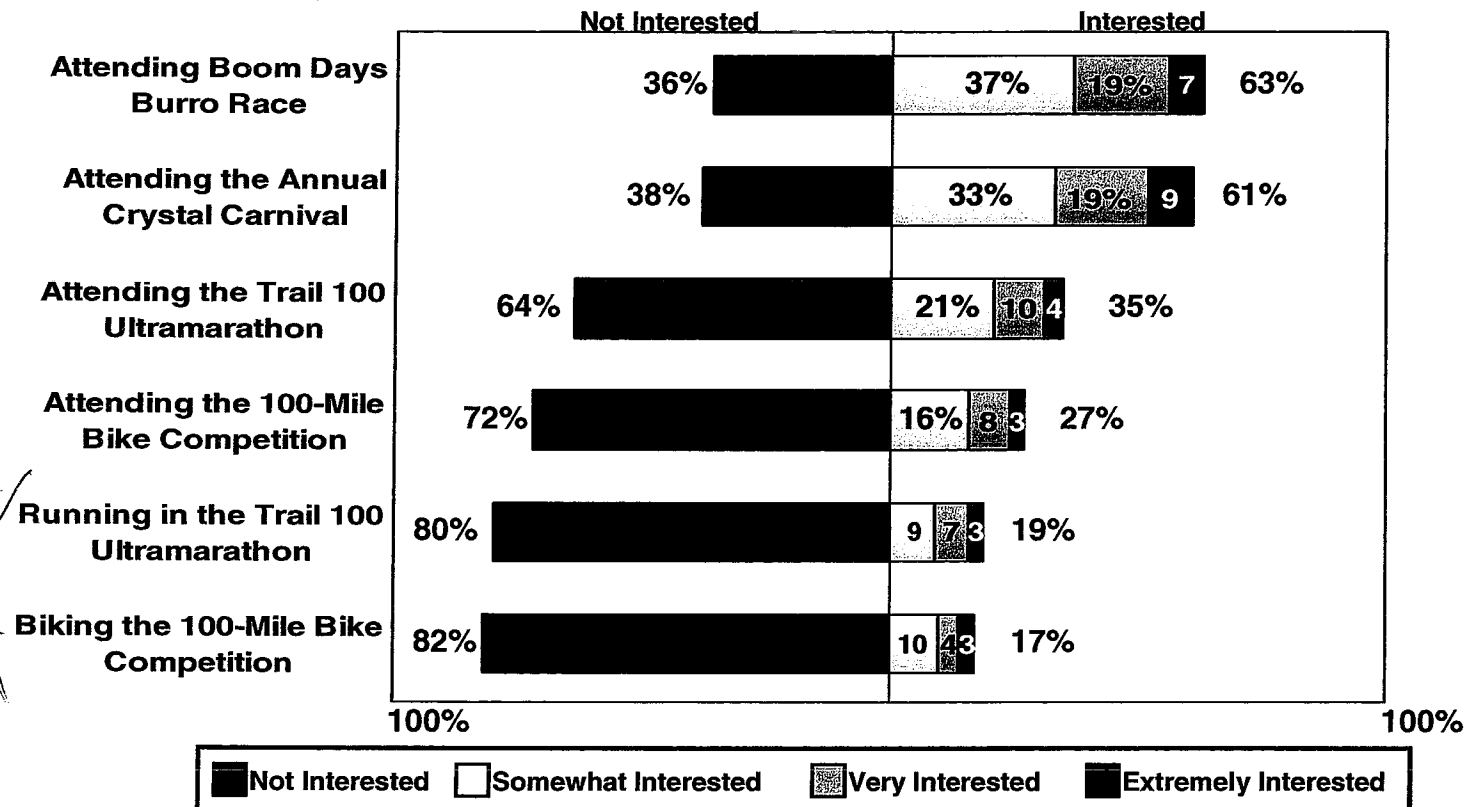
- A total of 52% of leisure travelers are very or extremely interested in hiking categorically and 22% are very or extremely interested in *hiking a local fourteener*
  - The encouraging news for Lake County is that both can be offered, with a multitude of nearby options available
  - The most enthusiastic hikers will be looking for a wide variety of routes and terrains, from short, fairly flat hikes to longer, much more challenging hikes that could include bouldering or technical climbing



Q12

## Interest: Special Events

- Both the Boom Days Burro Race and the Crystal Carnival generate the highest overall levels of interest in local events
- While Leadville has an established reputation and following for its running and biking competitions, they are attractive to smaller but highly-targetable groups of enthusiasts
  - Given the success of the recent 2011 USA Pro Cycling Challenge, Leadville should dedicate itself to making a convincing application in order to be selected as a tour stop in 2012

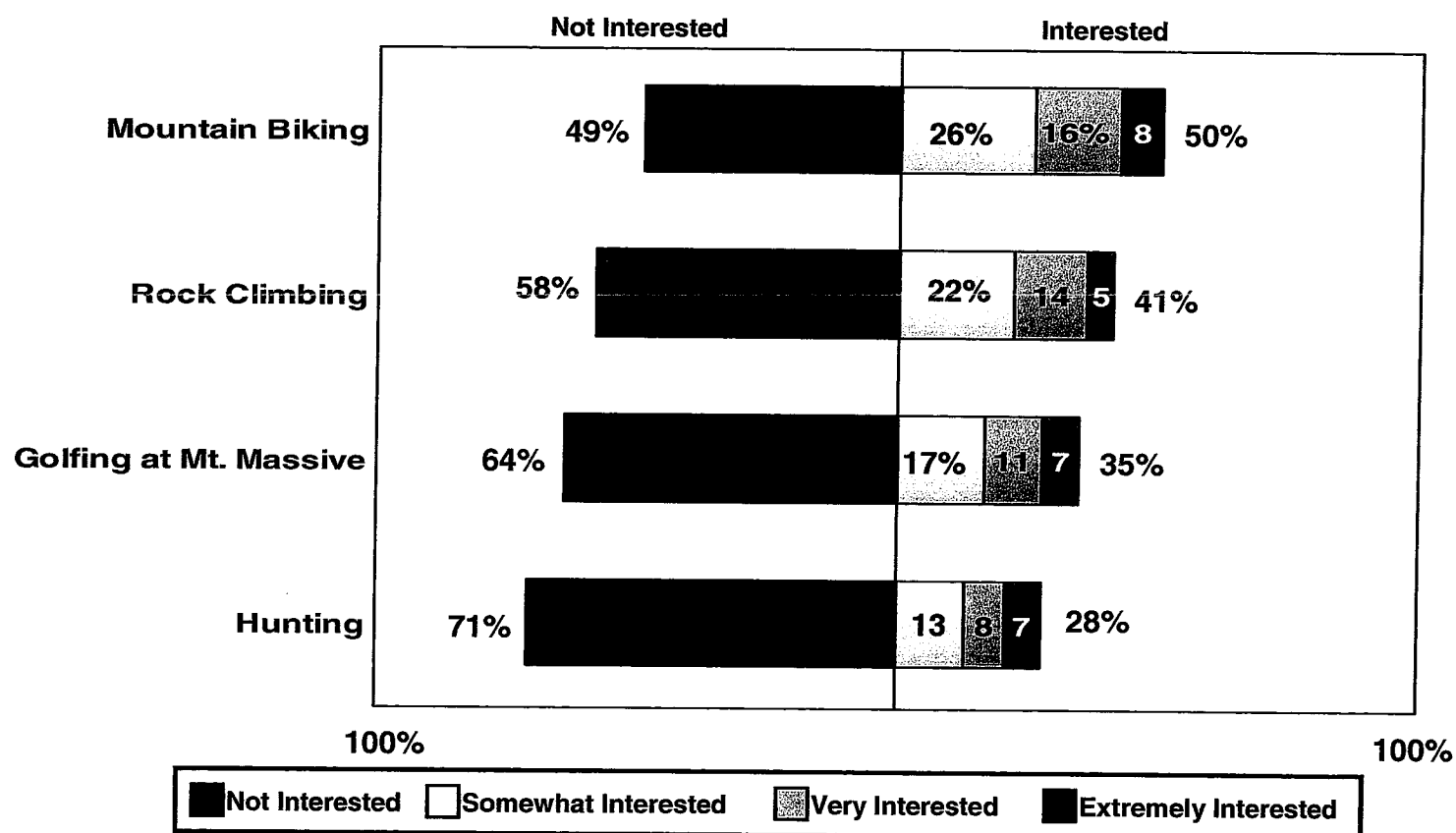


The Race Series  
Does this very well

Q12

## Interest: Non-Winter Sports

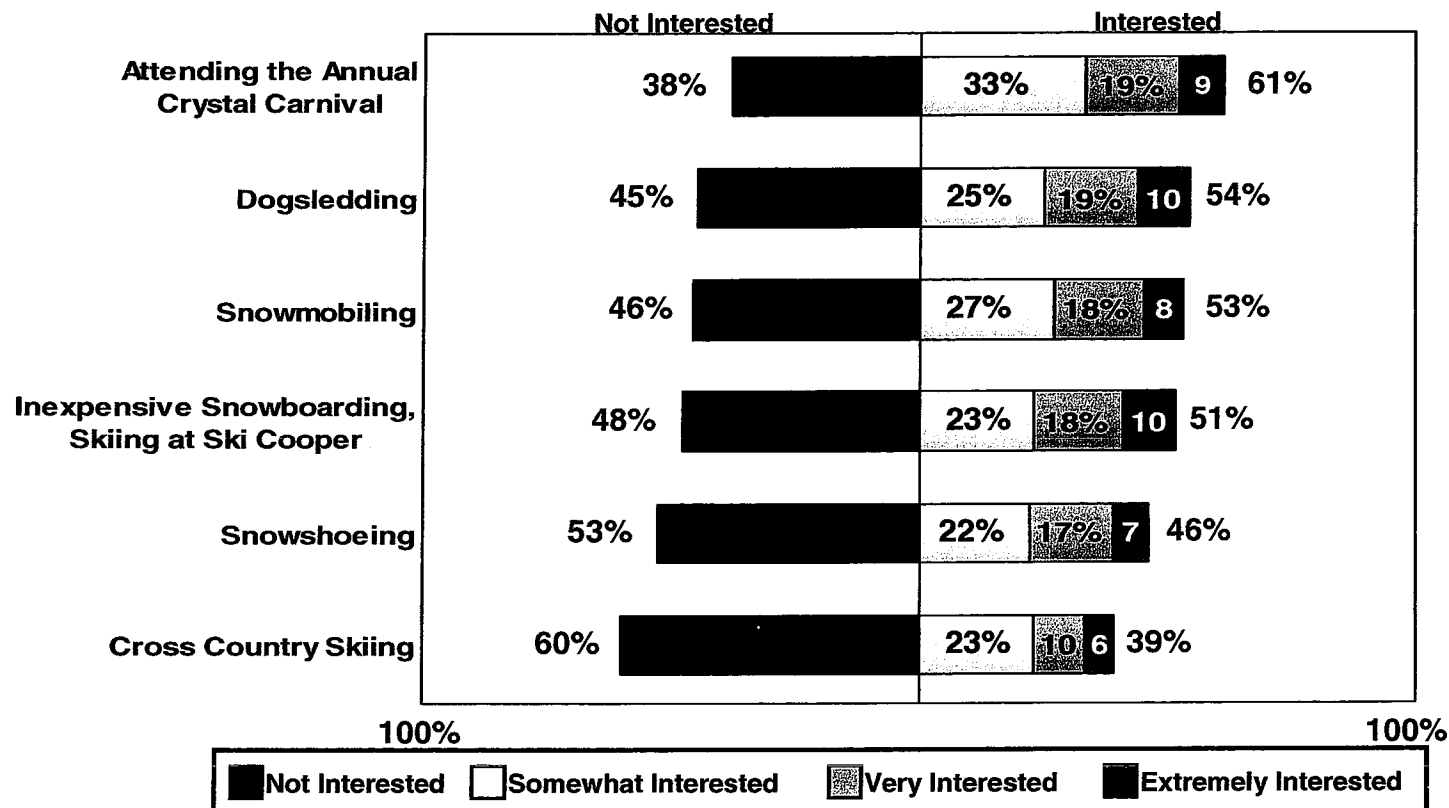
- Mountain biking and rock climbing are more pervasive reasons to visit the area than golfing or hunting
  - Golfers interested in mountain golf are probably much more attracted to the many competing 18-hole and 27-hole championship golf courses they've heard about, and who promote themselves more than Mt. Massive, such as the Breckenridge Golf Club, Keystone, Copper Mountain, Vail, Pole Creek, and others



Q12

## Level of Interest; Winter Activities

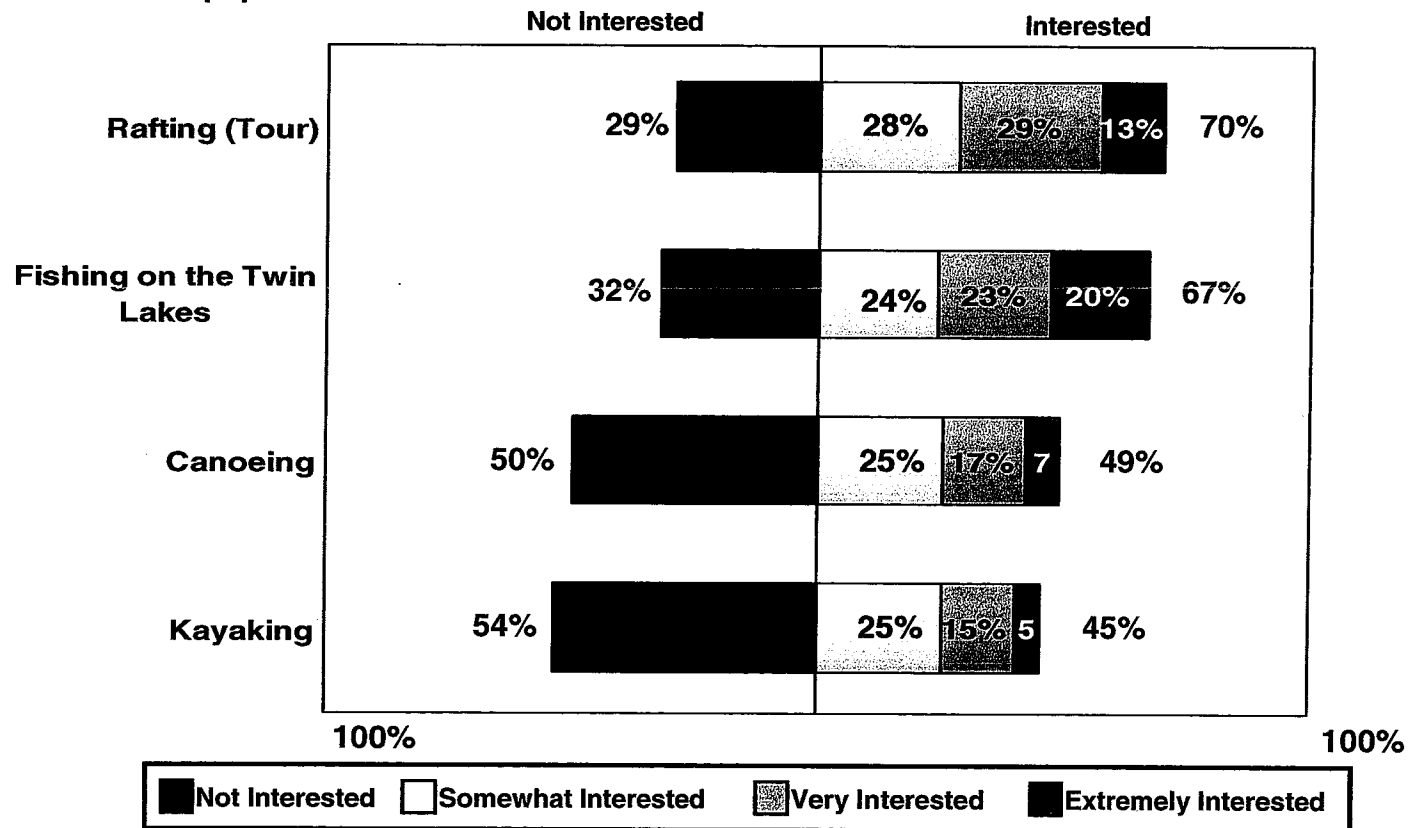
- Lake County may benefit from extending the duration of the Winter carnival, in order to attract larger numbers of Winter visitors
  - Attending the Winter Carnival generates the highest level of interest compared to every other Winter activity, allowing much more “sampling” of Leadville and Lake County
- Ski Cooper needs more extensive marketing in order to attract larger numbers skiing public who are anxious to ski more but pay less - when the cost is compared to virtually all other Colorado ski areas



Q12

## Interest: Water Sports

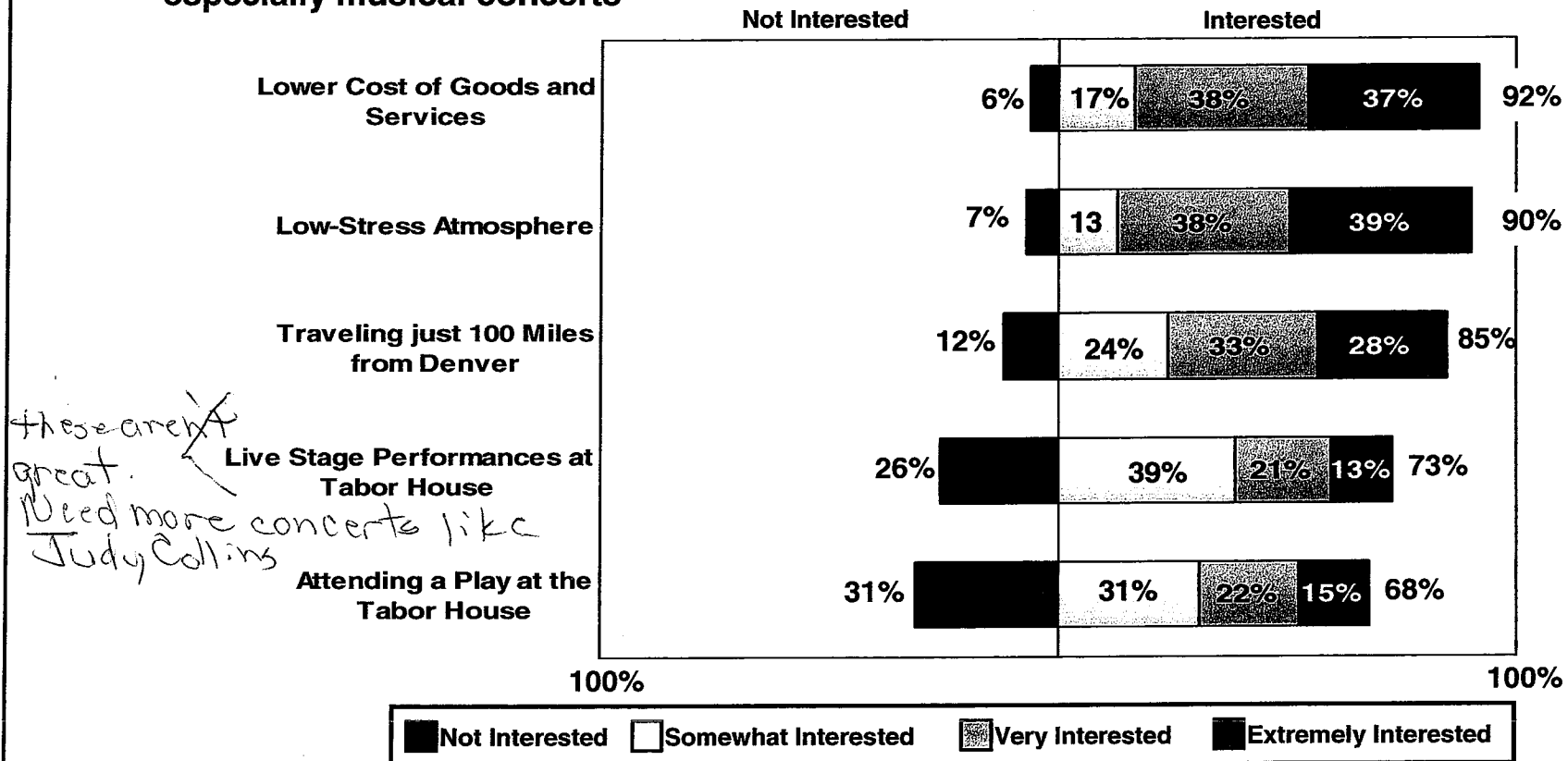
- Lake fishing on Twin Lakes generates a surprisingly high level of overall interest
  - This can be considered an indicator that higher levels of interest in fishing exists when river fishing, fly fishing, and ice fishing are also considered
  - Fishing lends itself very well to highly-targeted media, including fishing publications, fishing shows on cable TV channels, flyers placed at retailers such as Bass Pro Shops, and the fishing section of Colorado's newspapers



Q12

## Interest: Other Travel Factors, Stage Performances

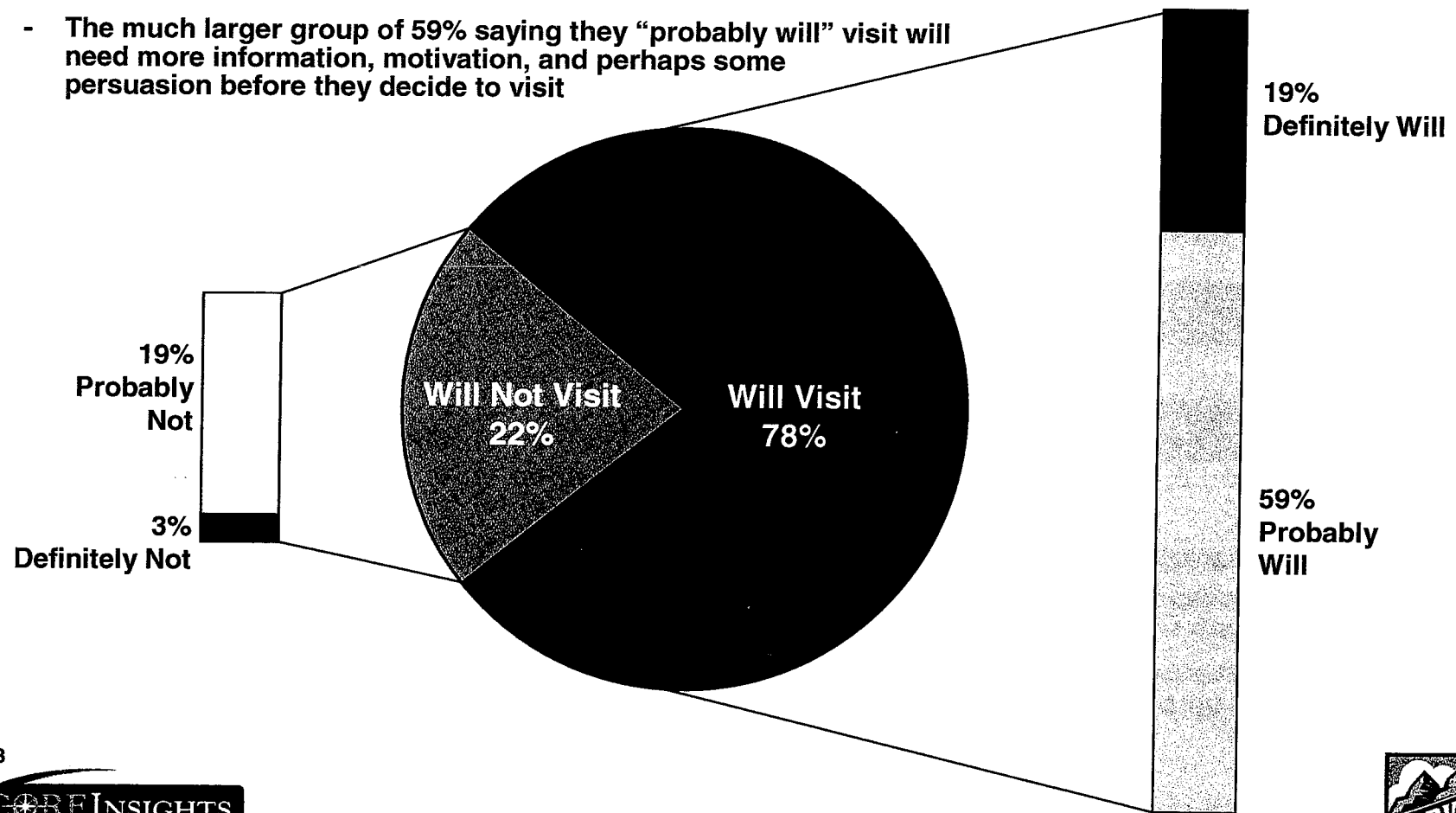
- Along with the strong desire for a relaxing, low-stress atmosphere of Leadville and Lake County, travelers are also quite interested in spending less money on their trip
  - Which travelers from Denver and Colorado Springs will appreciate, saving the time, frustration, and money over much longer trips to many of Colorado's more expensive, busier destinations
- Many travelers will be interested in events and plays at the Tabor Opera House - but especially musical concerts



Q12

## Interest in Visiting After Local Attractions are Known

- After leisure travelers hear about the variety of local attractions, events, and activities available, there is a high overall level of interest in visiting - comparing favorably to the base of 37% who reported making one or more previous trips to Leadville or Lake County
  - These results should be used with caution, however, since the percentage of "definite" interest is only 19% - those people who are most likely to make a future visit
  - The much larger group of 59% saying they "probably will" visit will need more information, motivation, and perhaps some persuasion before they decide to visit

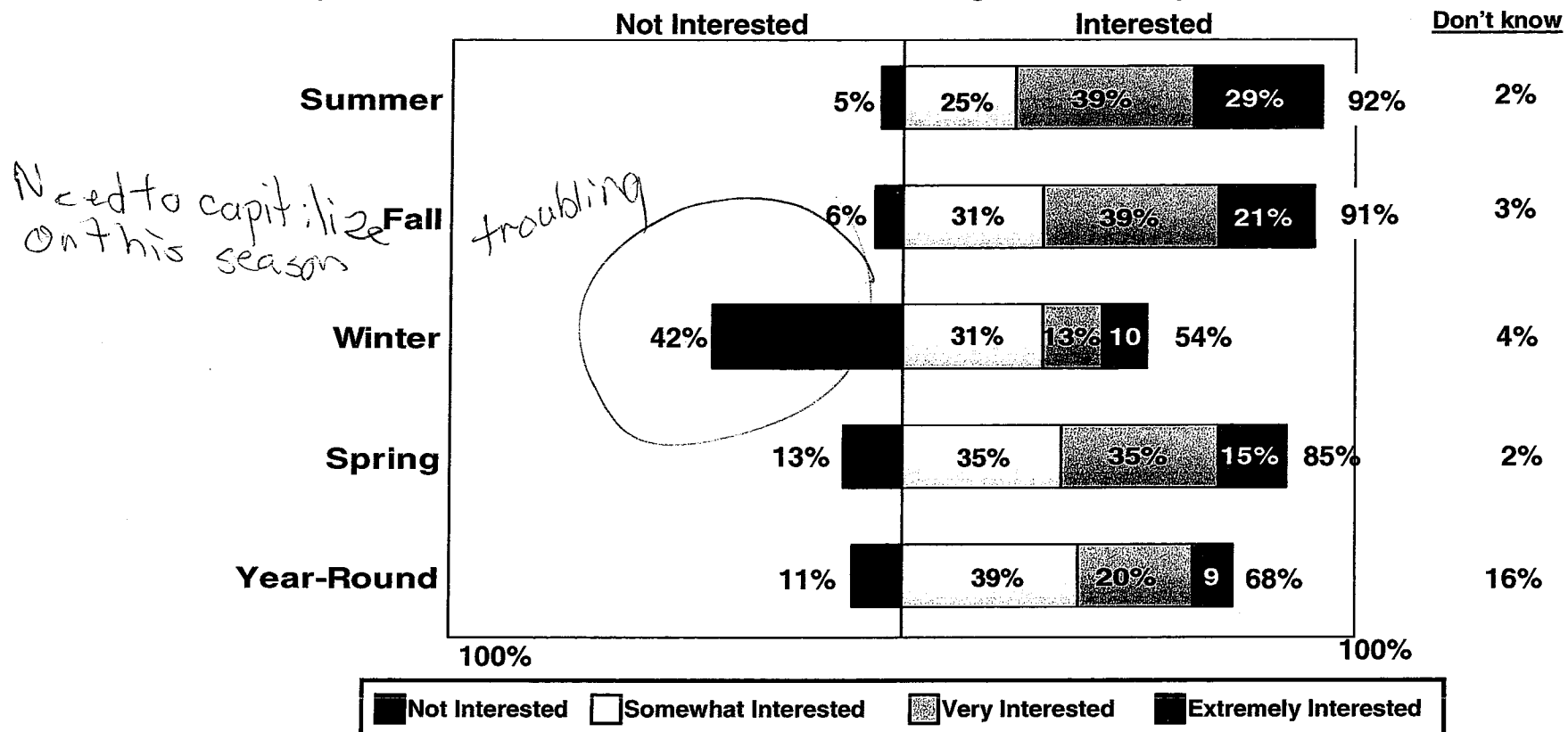


Q13



## Leisure Trip Interest to Leadville/Lake County by Season

- Low interest in visiting Leadville or Lake County during winter months detracts from its image as a year-round destination
  - Substantial efforts will need to be made to change these perceptions
  - Increased winter tourism will depend primarily on the Winter Carnival, marketing of Ski Cooper, additional marketing of cross country skiing, and access to both sledding and skating, and secondarily on the availability of other winter activities such as snowmobiling, snowshoeing, ice fishing, and dogsledding



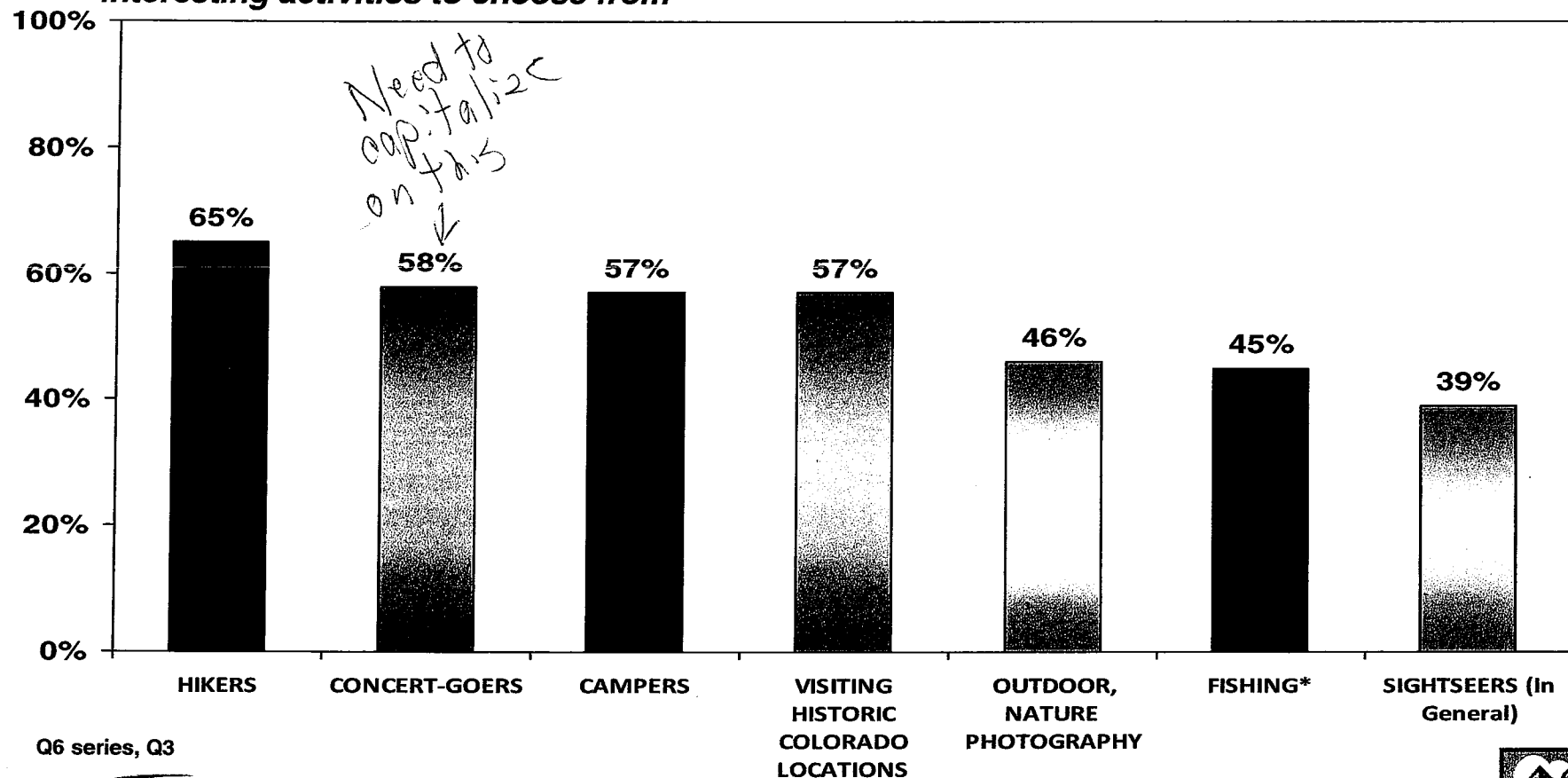
Q14



# **Largest & Most Distinctive Consumer Targets for Leisure Travel Marketing**

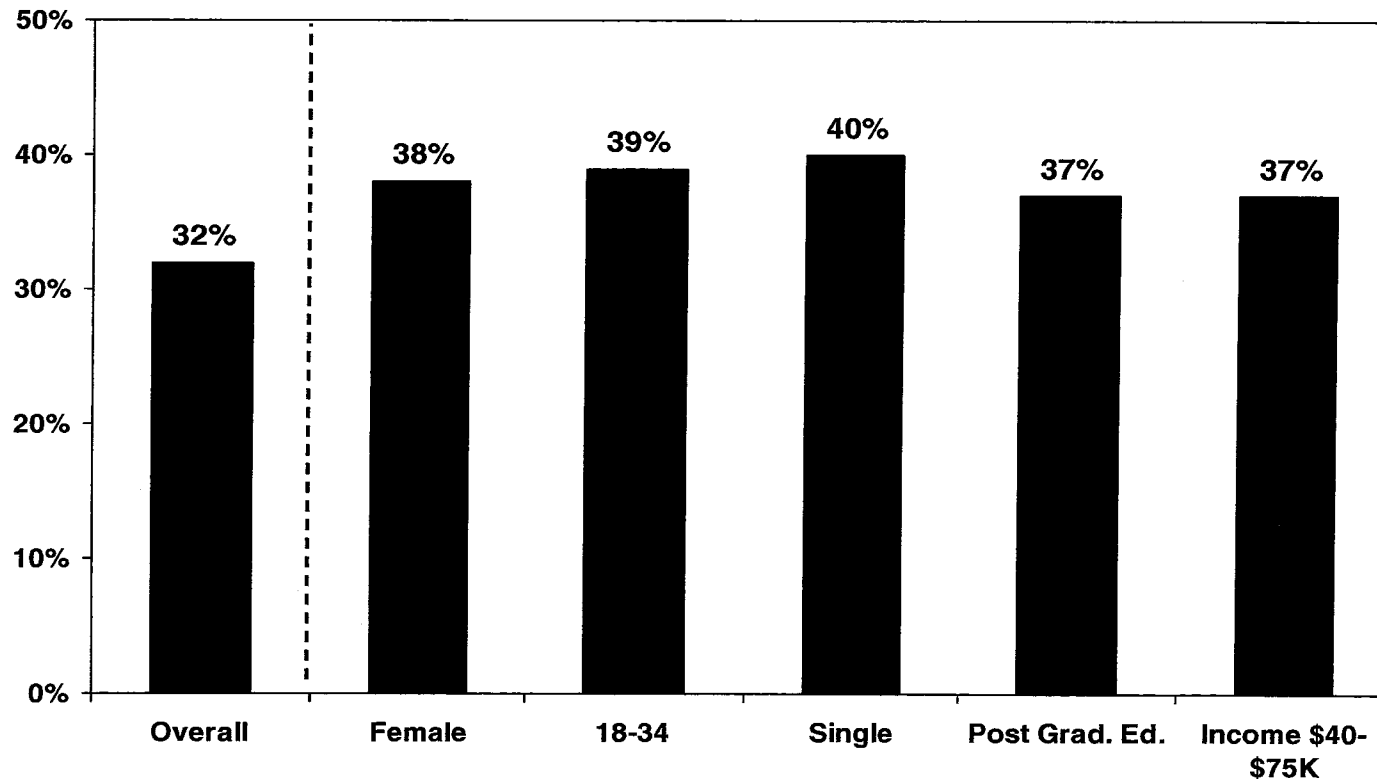
## Largest, Most Distinctive Leisure Traveler Segments

- The hiker segment is the largest, followed by musical concert-goers, campers, and history buffs
  - Additional, slightly smaller targeted groups include outdoor/nature photographers, fishermen, sightseers - many who simply want to enjoy the majestic scenery, nature, and the outdoors, at a casual pace
- *Individuals in each of these lifestyle segments typically have multiple interests - and they will be more motivated to travel, stay overnight and return when they know there are a multitude of interesting activities to choose from*



## Hikers: Highest Subgroups "Extremely Interested"

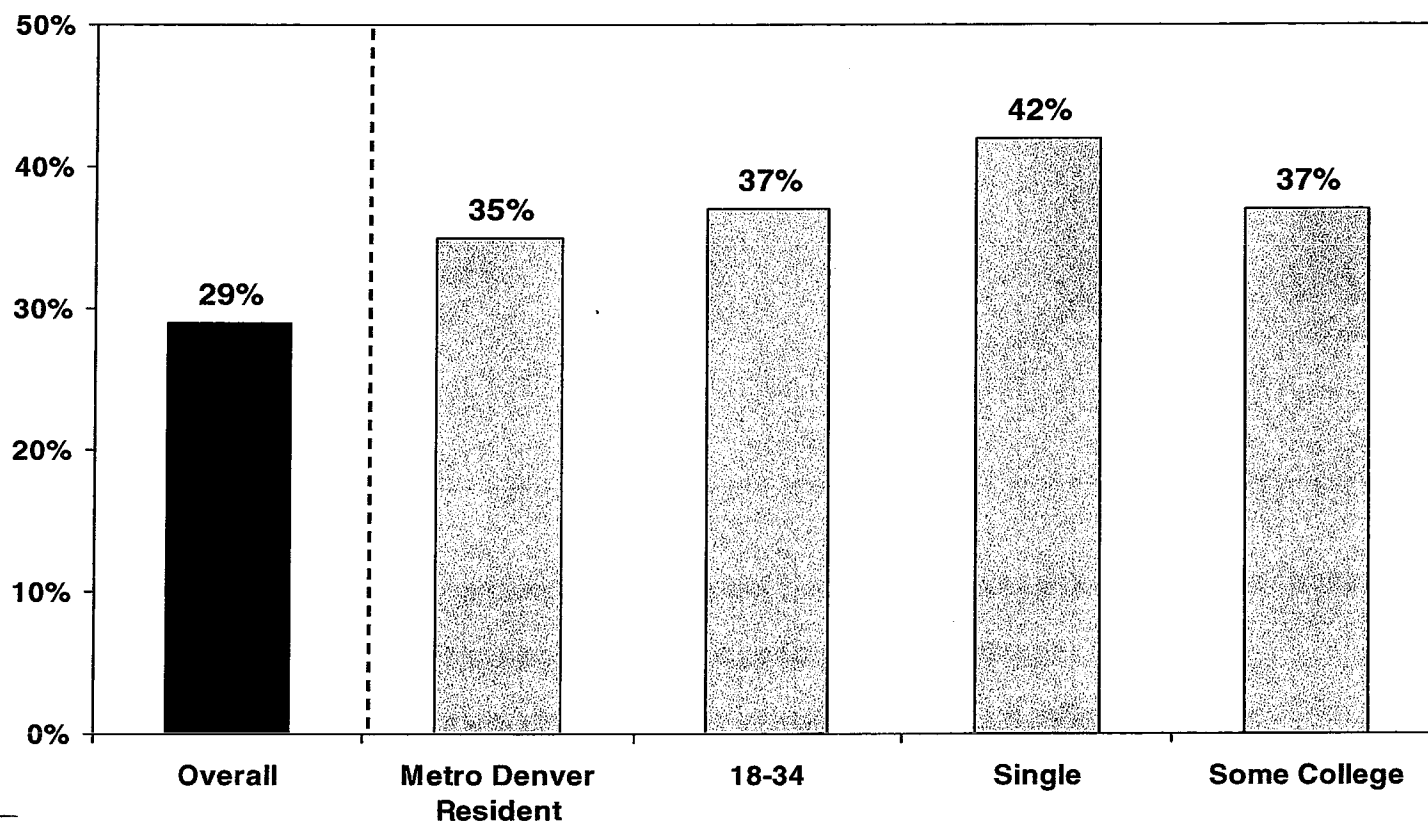
- Hikers are fairly represented within all demographic subgroups to a degree, but they are more likely to be female, young, or single *interesting*
  - And while they are more likely to be high in educational attainment, they are most often in middle-income category, due in part to their younger age
- Many hikers also camp, but hiking should not be "lumped in" with camping in future marketing communications - since there are many hikers who have little interest in camping



Q6o

## Concert-Goers: Highest Subgroups "Extremely Interested"

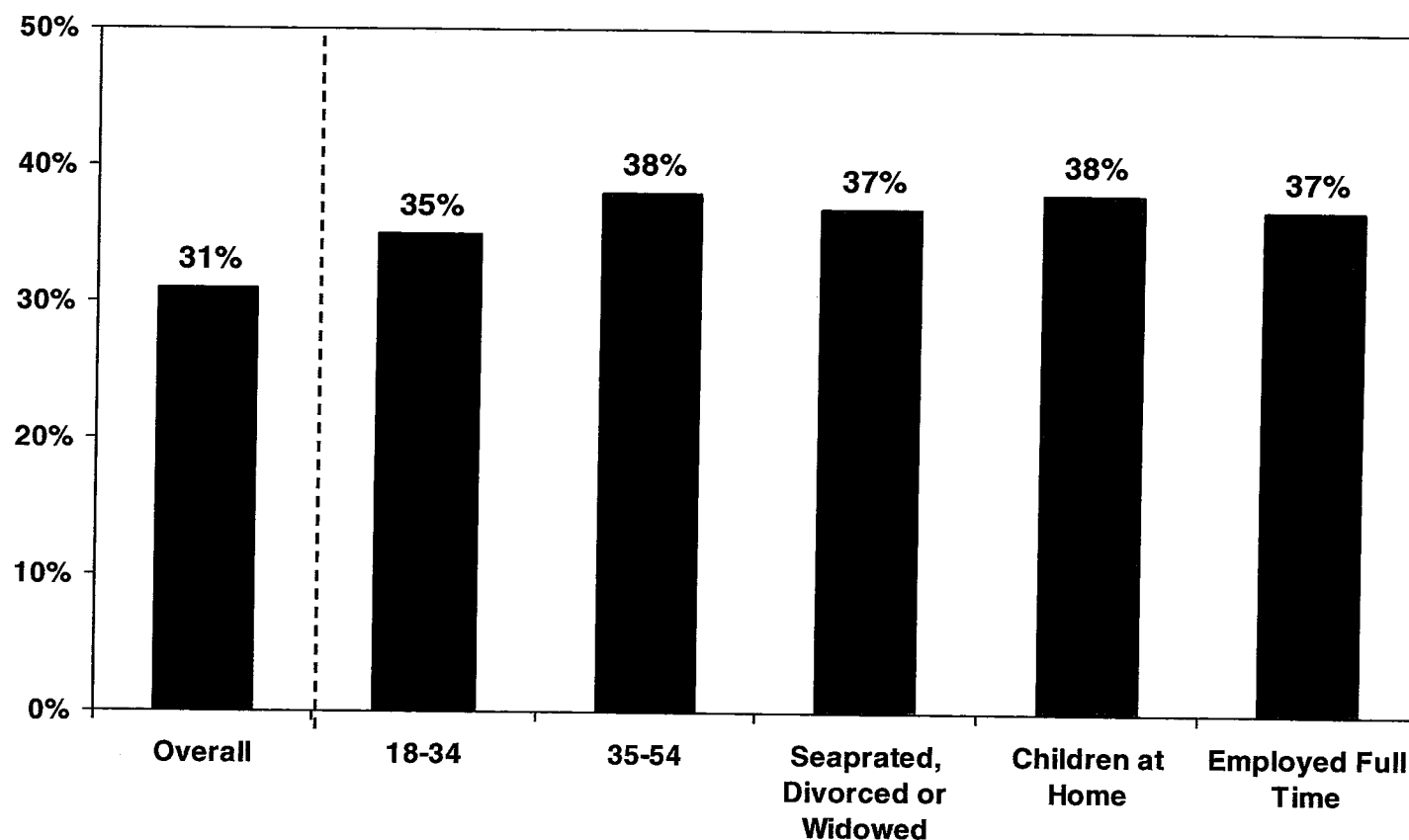
- Musical concert-goers represent the second most distinctive, differentiated consumer target
  - They are more often young, single residents of metro Denver - who could be attracted to concerts or festivals in Leadville either for single-day trips, individual events or potentially overnight



Q6aa

## Campers: Highest Subgroups "Extremely Interested"

- Campers represent a fairly distinctive set of demographic categories
  - They are much more likely to be 18 to 54 years of age, rather than 55+
  - They are typically separated, divorced or widowed, they more often have children at home and are employed full time

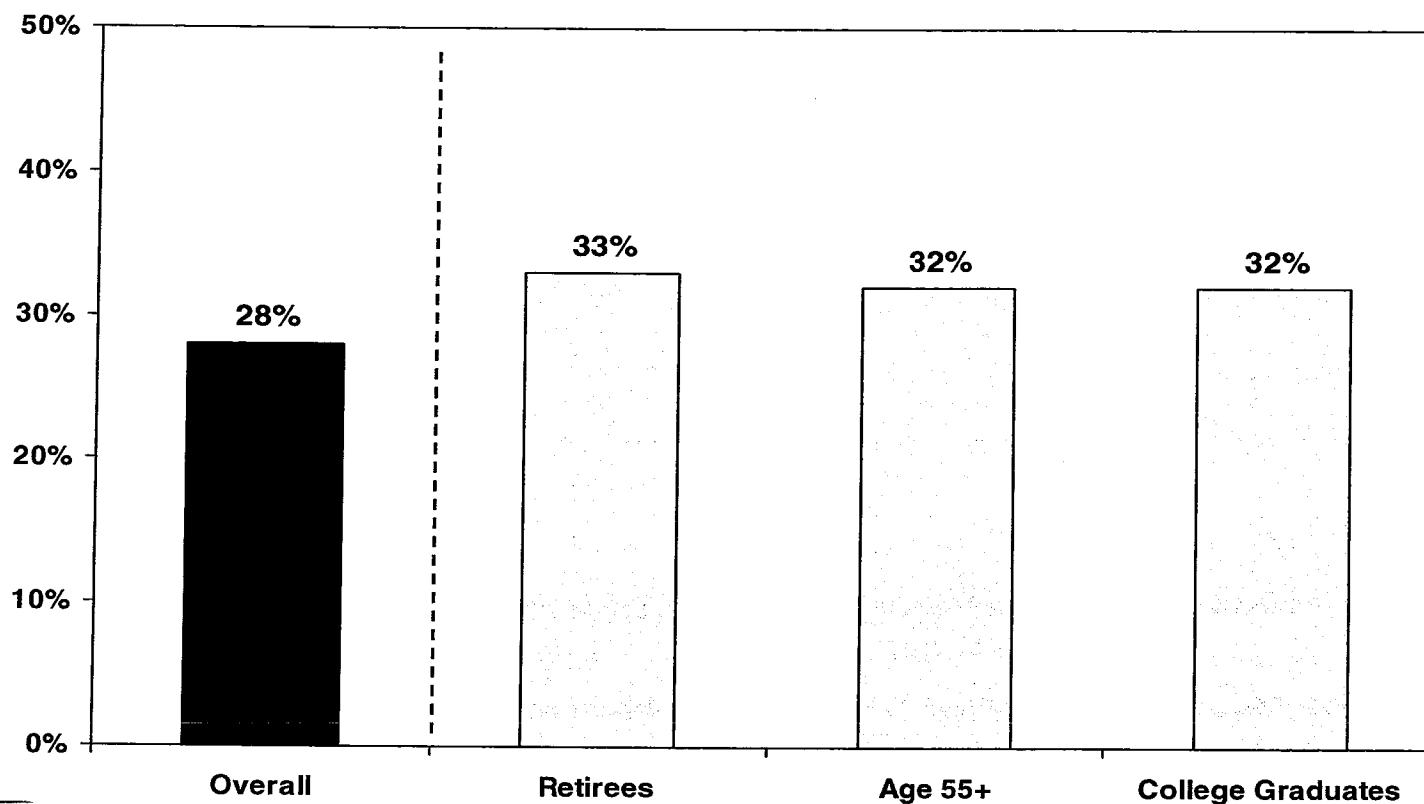


D6c



## History Buffs: Highest Subgroups "Extremely Interested"

- History Buffs are more often older retirees 55+ who are college graduates
  - Some of the older History Buffs 65+ can be an attractive target for guided group motorcoach tours to historic Lake County locations, especially from the large metro Denver and Colorado Springs population centers
  - Leisure travelers interested in local history need to visit the area with the expectation that several trips will be needed to fully explore the historic local destinations and that they need to visit at least yearly to keep up with new, changing exhibits featured at local museums

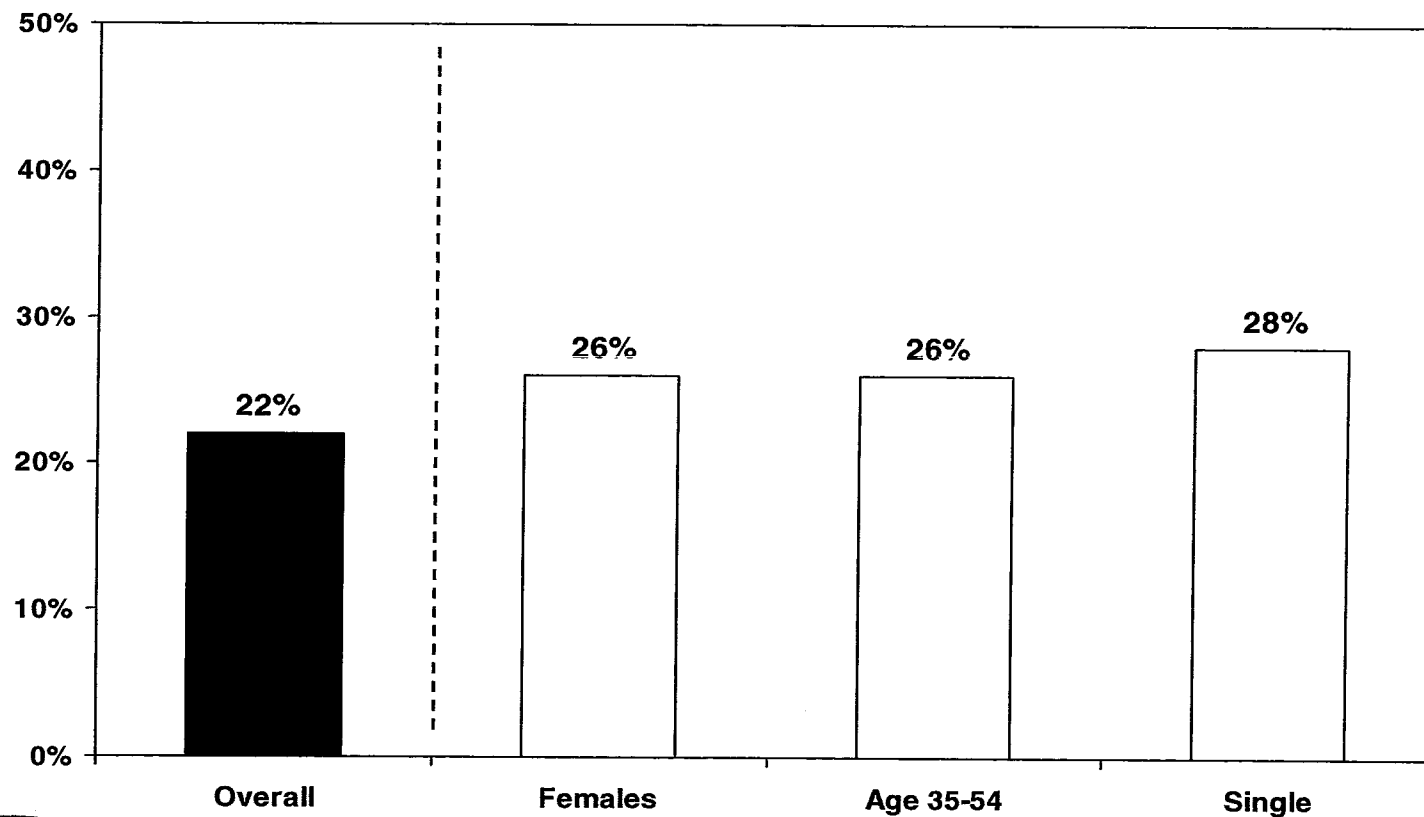


Q6aq



## Photography: Highest Subgroups "Extremely Interested"

- Interest in outdoor and nature photography is spread rather evenly across demographic categories
  - Indicating it is much more of a lifestyle variable than an activity that can be targeted based on specific demographics

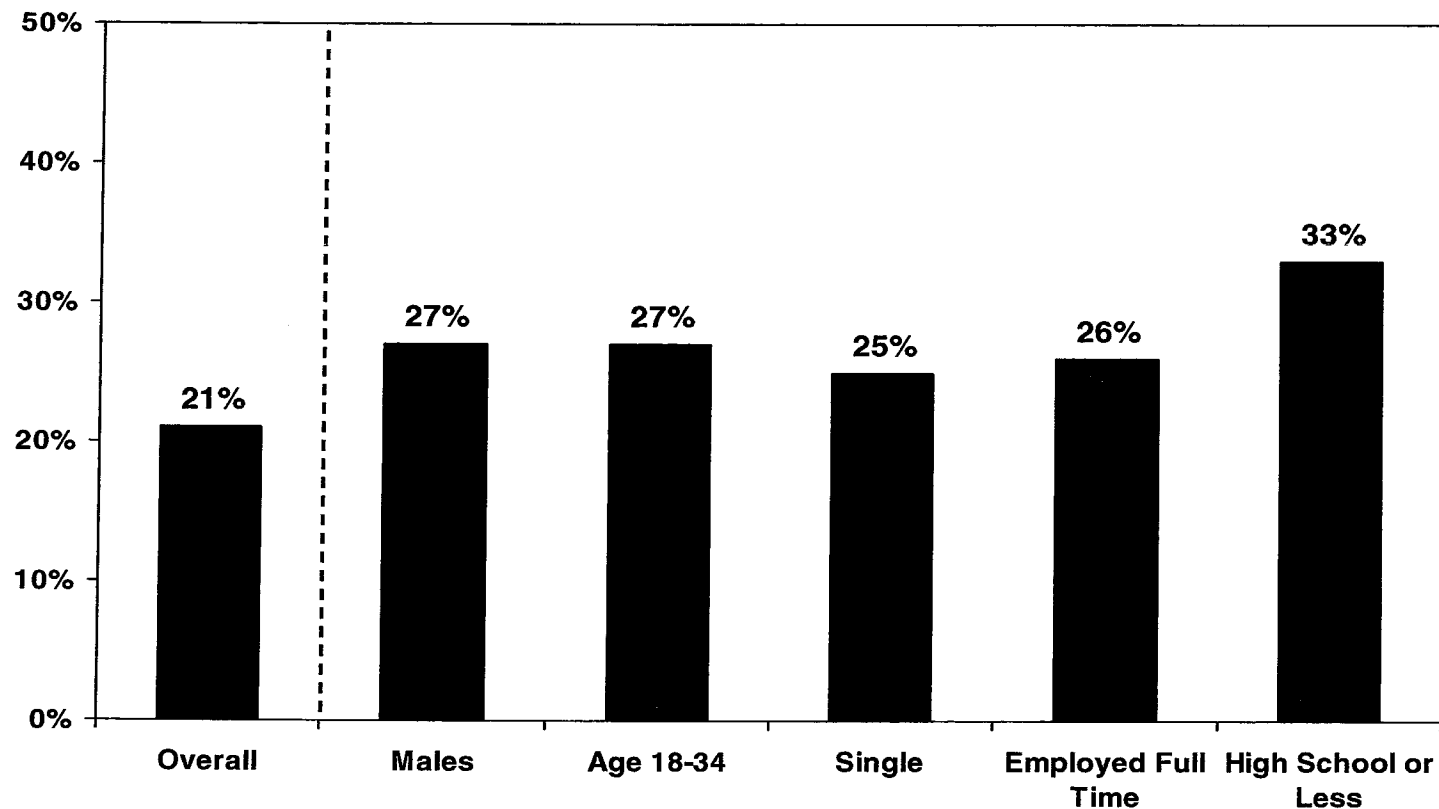


Q6a1



## Lake Fishing: Highest Subgroups "Extremely Interested"

- Fishing is more often a leisure activity for young, single males who have a high school education or less
  - The stereotype of middle-aged males does not apply
  - Again, fishing provides a variety of highly targeted, efficient media and promotional tactics that makes this group attractive for future leisure travel marketing



Q6m

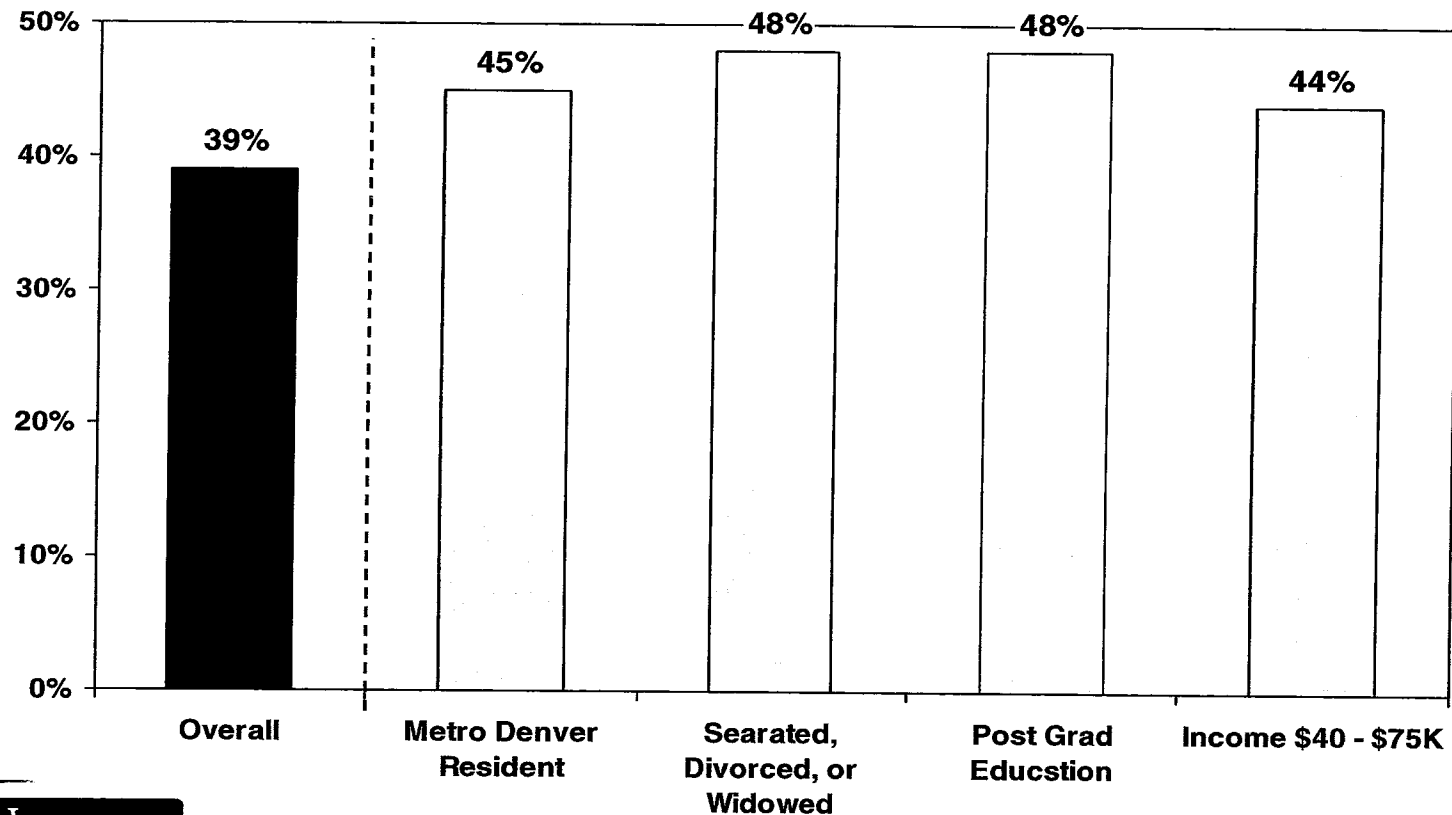


*Note: Since results are for "Lake Fishing" alone, total fishing interest is somewhat understated.*



## Sightseers: Main Leisure Activity on Most Recent Trip

- “Sightseeing” was the most frequently-stated reason for overnight leisure travel within Colorado, representing a distinctive travel segment of travelers
  - This is quite different from the more purposeful, goal-directed activities such as hiking or camping, but fits in well with the strong desire travelers have for relaxing, unhurried travel experiences
- Lake County is a desirable location for sightseeing since it offers majestic mountain views, old historic sites and buildings, wildflowers, lakes, animals, and golden Aspens in the Fall



Q3

# **Key Results**

## **Follow-up One-on-one CORE Interviews**

## Thoughts about Making a Trip to Leadville/Lake County

- Given the lack of awareness and specific knowledge about Leadville and Lake County, consumers often give positive but vague ideas about envisioning a trip to the area

*It's up in the mountains. I'm sure they've got good vistas.*

*I think I was in Leadville once a long time ago. I really enjoyed it. I just haven't had the time and opportunity to go back.*

*I think that Leadville could be a good getaway, but I don't really know how far away it is.*

*I'm not sure if they have any four-wheeling roads up there, but I'm going to look into it.*

*Going to Leadville or Lake County is just probably something that we would put on our list to do, eventually.*

- The small minority of travelers with firsthand experience or knowledge of Leadville and Lake County have more positive thoughts about visiting

*I know they have a lot of history in Lake County. It would be interesting to see.*

*I absolutely think of Leadville as an ideal getaway place. We're not going to take a two day trip to Albuquerque just to get away, you know!*

*Who doesn't want to visit Leadville? It's one of those towns you just want to see because of the gold and silver history, and see how people lived back then.*

*Leadville was a mining town. There's hiking, nature walks, fishing, and things the kids would like. They have train tours and horseback riding. I really like riding horses so I liked that. I am an outdoors guy.*



## The Special Feeling of Colorado's Mountains

- Just “being in the mountains” generates the desirable feeling of separation from the “real world”
  - Leisure travelers sometimes have aimless sightseeing in mind, but their motivation to head for the hills is driven by a strong desire to *disengage, relax and significantly de-stress*

*I think the advantages of traveling in Colorado are that you can learn about the history of Colorado and compare life and see how hard it was back then with no TV or internet or phone.*

*When you are up in the mountains you get a more laidback feeling of how life was a hundred years ago, when people didn't have to worry about stress and taking valium and things like that.*

*Camping is our stress outlet, where we can go where there is no cell service and it's just calm.*
- The close-up mountain scenery itself creates a sense of peacefulness
 

*I love to see new things. I go back to places a lot of the time because they have things I like, like the festivals. And the scenery is amazingly beautiful.*

*When I'm hiking up in the mountains, that's when I really have a chance to let everything go. It really clears my mind.*
- Leadville and Lake County clearly have a distinct opportunity to promise and deliver an uncrowded, unhurried, “ultracasual” feeling
  - That is not readily experienced at most other Colorado mountain destinations

## Descriptions of an "Ideal" Leisure Trip in Colorado

- Colorado's setting, the availability of *multiple* desirable activities, and spending time with loved ones and close friends are the ingredients for an ideal leisure trip

*For my ideal trip it would be nice to be able to go camping with friends, and spend as many days as possible; hiking, looking at wildlife, river fishing and taking photographs.*

*I would be in the middle of a lake, fishing with my extended family. My daughter and her husband and kids, and my son and his wife.*

*Ideally I would go to Colorado Springs with my kids and visit Garden of the Gods, go to the zoo, see the cliff dwellings and Seven Falls.*

*I'd be with my wife and animals, two dogs. We'd be somewhere near a lake or stream, and my wife and I would go fishing.*

- Leisure trips are attractive when a "home base" is established for a favorite activity

- Access to other activities and amenities nearby can make the destination much more appealing

*A really good trip for me? I would probably go to Snowmass and rent a condo so I can attend the music festival over Labor Day weekend.*

*I like to four wheel drive in the sand, so I'd go somewhere near the Sand Dunes and do that for a couple days.*

*I would love to go up to Blackhawk and get a room for a few nights, so I could do all the gambling my heart desires. I would also look for day hikes out of the area.*

60% of  
responders  
like to visit  
in fall.  
N41 Forest  
campgrounds  
close Labor  
Day.  
Not good

## Lake County's Proximity is an Important Advantage

- With over 3,000,000 residents living in the metro Denver area, another 700,000 in Colorado Springs and many more located in Colorado's Front Range, Lake County's proximity is attractive to travelers who want to save both time and money when they take their trips

- Travelers like taking trips that are fairly close to home
- Rocky Mountain National Park and Estes Park are often mentioned as a favorite locations

*I live in Fort Collins, so we like to take trips that are close, like Rocky Mountain National Park, to go camping. We go every year.*

*We like to go hiking in the Estes Park area because it is close.*

*We go to Rocky Mountain National Park every year to hear the elk bugle. The drive is pretty cool.*

*Rocky Mountain National Parks is one my favorite places to take day trips or extended camping trips.*

- Travelers planning a drive to Leadville and Lake County are likely to consider I-70 as part of their potential route, but they should have access to maps showing less congested, more scenic routes - 285 as an alternative
  - Similar to what Rand McNally has done for years
  - Offering highlighted, more desirable routes will foster a greater sense of enjoyment and relaxation, rather than initial frustration from traffic that occurs so often on Interstate 70

## Day Trips are Important - but Should Not Be Emphasized!

- Residents of the Front Range are anxious to make the most of living in Colorado by taking day trips, often to areas within an hour or two of metro Denver, Fort Collins, or Colorado Springs
  - The closer the better, and the separation from the cities, the clamor, and the crowds are appreciated
 

*The last time I took a day trip to Leadville was in June. It was a great scenic drive, not too long. It was a full day.*

*I like going up there to Ski Cooper because you can save some money by skiing there, and it's less crowded.*
- While the survey focused on overnight travel to Colorado locations, Leadville and Lake County can certainly be sampled during day trips, especially from the Front Range
  - Positive day-trip experiences will depend quite a bit on the drive, as day-trippers are anxious to experience a sense of relaxation as they start their trips, not just when they arrive at a destination and get out of the car
 

*Driving is part of the trip. If the weather's nice and it's not crowded on the road, you can put on some music, take in the scenery, and relax.*

*When you take a day trip, it's how easy the drive is that matters.*
- If there is too much focus on Leadville's close proximity to the Front Range, it could potentially gain a reputation *primarily* for day-trips
  - Rather than the more desirable reputation as a great place to *spend a couple days, unwind, and have fun*

*We rarely spend the night in the mountains because it's just two hours up and two hours back, and with three kids that's a lot of costs for a hotel.*



## Seeing or Trying "Something New" is Strong Motivation

- Travelers sometimes make trips as a getaway, for sightseeing, or for more specific activities such as hiking, camping, fishing, or others, but there is also a desire to just *"try something new"*
  - While hikers will hike, campers will camp (etc., etc.), they also like to encounter unexpected activities on their trips, expanding their horizons

*When we think about taking a trip, we're looking to go somewhere new, for new experiences and new memories.*

*For us, travel is more fun if we can to a place and maybe find something new, not just hiking and biking.*

*If you just travel to the same place all the time you might be missing out because you haven't tried something that you really might like. It's like ordering the same food at a restaurant all the time.*

*I'm always more inclined to see new places.*

- New, unexpected sights and activities will get travelers out of their vacation ruts and give them much more to talk about when they tell others about their trip

*The advantage of seeing new places in Colorado is to find new locations to tell Grandkids about.*

- Leisure travelers are intrigued by many of Leadville's and Lake County's unusual activities and the many historic attractions travelers have not heard about before
  - To build increased visitation interest, satisfaction with an initial trip, and repeat visits, engaging in a combination of several activities is key – along with knowing about many more that are also available
  - This does not mean that travelers to Leadville need to get busy and be on the go all the time, it can simply mean that they've experienced an impressive local Mine tour, a pleasing restaurant, a nice walk, or the ambiance of an historic hotel, while learning about additional attractions for future visits

## Hiking, Recreation, and Other Activities

- As seen clearly in the survey, hiking is the most popular leisure activity among Colorado's leisure travelers
  - Information about hiking in Lake County needs to include the full range of hiking available, from short, easy hikes to hiking one for more 14ers

*I think as my kids get older we will definitely want to go hiking more. Right now they go half a mile and are tired.*

*We love the mountains. Every other weekend we go on a hiking trail. You know, the easy ones for the kids.*

*We go about twice a month to the mountains and do many different hikes.*

*My ideal trip to the mountains would include getting to the top of a couple fourteeners.*

- While a very focused, targeted, concerted effort should be made to attract more hikers to Lake County, several other high-interest types of recreation need to be promoted as well
  - Mainly sightseeing, camping, fishing, and nature photography, but also a few, more targetable activities such as bicycling, birdwatching, high-altitude golf, or fitness training

*Along with hiking a fourteener I'd want to go river rafting somewhere nearby.*

*Boating or fishing on the lakes up there (Lake County) is something I always look forward to, and who doesn't like a good hike? And I would love to go golfing at Mount Massive.*

*Having a variety of activities available in one place is important such as outdoors stuff like hiking, but also things indoors too, like museums.*

- Hikers, campers, fishermen, others will be much more interested in visiting Lake County *when their primary leisure time activity can be supplemented with a variety of additional, interesting activities*

## The Importance of History and the Old West

- Many travelers are motivated primarily by their appetite for experiencing and learning about Colorado's history, at many different destinations
  - Interestingly, this is an advantage for Leadville and Lake County *because many travelers have already visited their "primary" historic locations - the ones highest on their lists - but not Leadville*

*What I enjoy most is Durango. There's a lot of history down there.*

*We like old towns because a lot of them still have old houses, and it's neat to see how people lived in the gold and silver mining days.*

*I'd like to visit other places in Colorado to get to know more of the history, to get to know my state better. I'd like to do that more, even though I've lived in Colorado for thirty-five years.*

- Among the traveling public, little is known about the importance of Colorado's early history and the wide variety of local historic sites available
  - *Unfortunately, they don't know what they don't know!*
- Americans love the intrigue of the "Old West" – which can be positioned by Leadville as a specific, fascinating subset of its local history

*I really enjoy history. I didn't like it in school, but now I'm reading all about the Old West, like the cowboy forts and things. I've been on lots of tours to forts, like Fort Robinson, where Crazy Horse was.*

- Longer term, Leadville could develop more of an "Old West" theme for its visitors, to augment its reputation for mining history and the Victorian era *Develop 2nd St*
- Don't forget Native American and geological history, as history buffs are attracted to a very wide range of historical subjects

## Tours - Especially Guided History Tours - Are Appealing

- Colorado's traveling public are often well-educated and inquisitive
  - Within the much larger group of History Buffs are subsegments such as older travelers and parents with children who are looking for a real educational experience that only knowledgeable, capable guides can offer

*We went to Mesa Verde last year and went on a tour of the ruins guided by a Ranger. I think there were a few self-guided tours, but we had not been there for years, so we did the Ranger one because of the kids.*

*In Leadville, the mining tours and the train ride sound fun. I'd watch the Ultramarathon, but not race in it. That would be neat.*

- Especially for parents traveling with children, much more prominent promotion of Leadville's National Fish Hatchery is warranted
  - This can easily represent an outing for the day, instead of just a "drive-by." I especially since their website lists an enticing variety of additional leisure activities
  - The availability of tours instantly represents a more interesting, more engaging educational experience
- While there is interest in guided history tours, *a majority of the traveling public will continue to explore on their own*
  - Educational materials such as books, pamphlets, maps and DVDs should be readily available to visitors for self-guided tours *make Route of the Silver Kings more prominent*
  - For historic Leadville and Lake County sites, historic markers and plaques should be installed to give visitors much more of a feeling that interesting, important historic sites abound

## A Surprising Level of Intrigue with Ghost Towns

- Both in the survey and in these interviews, touring ghost towns emerged as a popular reason to take more leisure trips in Colorado

- Interestingly, taking a trip to just one or just a few ghost towns will not suffice

*In Colorado, there are so many ghost towns! Right now we are putting together a list so we can spend a week or so traveling between them.*

*Last summer I went on a trip to Buena Vista and then Leadville. and saw all of the old ghost towns. We spent three days there and did a lot of different activities. We went to the mining museum one day and the Hot Springs.*

*We love driving through the mountains to see all of the ghost towns and little mountain towns. Just recently we went over Trail Ridge Road to this place near Walden to see a ghost town.*

*When I travel in Colorado, I like to see all the ghost towns.*

- While the term “ghost town” is sometimes considered single locations that have remnants or foundations of a few buildings, the definition should be expanded to include “ghost mines” or “ghost encampments” for several mining locations in Lake County
- In order to provide an entre to travelers interested in ghost towns - but anxious to include several local “ghost mine” locations in their list of desirable spots to see

## Colorado Destinations Have Their Disadvantages

- Many Denver travelers, and especially skiers and summertime vacationers, dread the traffic tie-ups they routinely face on Interstate 70
  - This is recognized as a significant problem that will likely worsen before it gets better, making many Summit County, Vail and other locations farther West

*Everyone knows it's bad in the Winter, but there are times in the Summer when the backups are just as bad, if not worse.*

*I heard somewhere that the record number of cars that went through the Eisenhower Tunnel was set on a weekend day in August, not during the ski season. That didn't surprise me, because I've been in those traffic jams.*

- Glenwood Springs is a popular destination that has recently received accolades, but using I-70 to get there is a disadvantage, along with its distance from Colorado's Front Range

*When I travel in Colorado I don't want to go anywhere as far as Aspen. I don't even want to go as far West as Vail.*

- The high expense and "uppity" feeling of locations such as Vail, Aspen, and Breckenridge keep some travelers away

*I've lived here all my life and I've been to all four corners of Colorado. But I've never stayed overnight in Vail because it's just too expensive.*

*I used to go to Breckenridge in the Summer, but it's gotten way too developed and busy. I could hardly find a parking place the last time I went. It's expensive there, too.*

*I do like going to a place like Leadville, which is quite reasonable. It's not like Aspen.*

*We went and visited Aspen recently, but I can only stand so much of Aspen!*

## Colorado Destinations Have their Disadvantages (continued)

- Coloradans typically find ways to enjoy themselves outdoors in the Winter months, but not everyone is a close personal friend of old man Winter

*I prefer to go places in the summer because it's nicer to travel then; you don't have to worry about any snow.*

*We go on more trips in the summer when the kids are out of school, but we are sure to look for the places that are least crowded, otherwise it is impossible to keep an eye on them!*

*In the winter we spend a lot of our time at museums. We are not snowbirds!*

- Unfortunately, one person in a family with an aversion to Winter will keep others from traveling during the Winter months

*My wife is not a snow person, so we would probably only go to Leadville in the Spring.*

- Travel during cold winter months is sometimes rejected *categorically*

*I prefer traveling in the Spring or Autumn. It's too cold in the winter. I've done the skiing and snowmobiling and sledding, but it's just too cold.*

## Barriers to Lake County Visitation

- **Leisure travelers are more willing to consider Leadville and Lake County for summer visits**  
*I prefer to go places in the summer because it's nicer to travel then; you don't have to worry about any snow.*  
*We go on more trips in the summer when the kids are out of school, but we are sure to look for the places that are least crowded, otherwise it is impossible to keep an eye on them!*  
*In the winter we spend a lot of our time at museums. We are not snowbirds!*
- **Unfortunately, ski areas other than Ski Cooper are foremost in the minds of Colorado's skiers**  
*When you think about skiing, you think more about places like Keystone, A-Basin, Copper, Vail, and places like that.*  
*Every year I get a ski pass that lets you in to several ski areas, so I just ski there. I've already got my ski pass for this year.*
- **Misperceptions exist about the severity of Lake County Winters, leading to concerns about how cold it gets and dangerous driving in too much snow**  
*I definitely would not go there in the Winter. I try to avoid mountain driving in the Winter and up there it get's way too cold.*
- **One mother expressed concerns about Leadville's high altitude, and the negative affect it might have on her children**  
*With Leadville I would be worried about the altitude. I am pretty sure it is like 10,000 ft in elevations, and I would be worried about how the kids would react. It would just be something that we would monitor.*
  - This concern is not pervasive, but information about Leadville's altitude should be provided on websites and in travels brochures, to offer tips about how it altitude sickness can be prevented



## Summary & Recommendations



## Summary and Recommendations

- The lack of awareness and knowledge about Lake County and Leadville are the most serious impediments to increasing leisure visits - along with scant prior visitation experience
  - Only 12% of overnight Colorado travelers are either extremely or very familiar with *Lake County*; 33% say they are only somewhat familiar, and a majority 55% are not familiar with Lake County
  - 23% say they are extremely or very familiar with *Leadville* - but a large group of 50% are at least *somewhat* familiar with Leadville, so it is not as “unknown” as Lake County
  - Among the 355 Coloradans surveyed, there were virtually no mentions of Lake County or Leadville as the location for their most recent overnight trip
  - 55% of Colorado travelers have either never considered a trip to Leadville or Lake County before (33%) or thought about it but went elsewhere (22%)
  - Low awareness of Leadville’s activities causes some first-time visitors to be left with the feeling of “been there, done that” - with little reason to return for follow-up visits
- In the near term, the focus of communication for generating increased interest in visiting should be on Leadville rather than Lake County, because of its higher name recognition
  - A longer-term goal should be to build awareness for *Lake County* - including its many features and activities
  - A starting point for increasing awareness for Lake County would be to add ‘LAKE COUNTY, CO’ to the current Leadville/Twin Lakes logo, but maintaining the remainder of the logo as it appears today
  - Usage of the current (or updated) logo should continue as it has in the past in tourism marketing and advertising, *but its use should be expanded and included as a recognizable “badge” on websites, in brochures for local attractions, and on signage visible to the traveling public*

## Summary and Recommendations

- Leadville and Lake County will continue to face stiff competition, most notably from the much more known, established destinations available to leisure travelers
  - The specific areas Lake County is competing with most are Estes Park, Summit County (including its individual communities and ski areas), and Glenwood Springs
- When leisure travelers hear about the wide variety of features, attractions, events and activities available in Leadville or Lake County, *a very large majority express positive intentions to make a future visit*
  - A total of 78% say they will visit; either *definitely* will (19%) or *probably* will (59%)
  - The very large group of travelers saying they *probably* will visit need additional information and some additional persuasion before they are motivated enough to visit
  - A small minority of travelers are not likely to visit, including some who simply have an established, familiar location they prefer to visit year after year, and some who prefer not to visit in the Winter
- Among all travelers included in the survey, the most common reasons noted for making an overnight leisure trip within Colorado are for sightseeing, shopping, hiking, camping, outdoor nature photography, fishing, learning about Colorado history, and casino gambling - in that order
  - Followed by additional, specific activities and interests such as bird or animal watching, attending musical concerts, lake fishing, and visiting historic museums
  - *While the survey results identify the list of main reasons of overnight trips, the follow-up in-depth interviews confirmed that travelers most enjoy trips that include two or more activities, along with the ability to stay in a local historic hotel, and have coffee or dine in local, independent cafes or restaurants*



## Summary and Recommendations

- From a marketing and branding standpoint, Leadville and Lake County need a much more focused identity for tourism marketing
  - While prior advertising and publicity has often done an excellent job of promoting travel to Leadville and Lake County for specific activities or purposes, usage of various websites by the traveling public gives rise to travelers seeing a wide variety of differing, sometimes disjointed images and information
- Based on existing perceptions of Leadville and Lake County, prior tourism marketing and publicity, and this research, the recommended focus of future tourism communications is:

### **“Discover Historic Leadville & Lake County”**

- The element of “discovery” is likely to be well-received by a wide range of travelers, especially history buffs, but also hikers, campers, bikers, fishermen, photographers, and concert-goers who have not yet “discovered” Leadville or Lake County as a viable, attractive destination
- Discovery will also be appreciated among parents seeking to educate their children as part of their family’s leisure trips
- A prime example of offering “discovery” - *beyond historic locations alone* - is featuring the Leadville National Fish Hatchery more prominently in tourism marketing materials, especially since it has a very well-developed website and a multitude of activities suggested to accompany visits there
- Discovery also gives rise to the expectation that there will always be something new and different to experience or learn - which Leadville and Lake County should promise and deliver in the years ahead

## Summary and Recommendations

- While there should always be a focused “headline” for future travel marketing, additional supporting points and communications should be offered to further encourage travel to Leadville and Lake County, including:
  - Continuing to indicate its proximity and location convenience, especially for Colorado’s Front Range travelers
  - The ability to experience an *ultracasual* atmosphere, that is extremely relaxing, uncrowded, and de-stressing, unlike most other leisure destinations, with locals who are welcoming and friendly
  - Multiple choices of recreational activities *that you, your friends, and your family are sure to enjoy*
  - A multitude of fascinating historic sites and local tours that enriches your knowledge and understanding of Colorado’s rich history, the Old West, and Colorado’s historical importance
  - Breathtaking views of nature and the mountains, among the most impressive in Colorado
  - The ability to exercise and train two miles high to achieve unsurpassed personal fitness and help achieve personal bests
  - Musical concerts, arts and special seasonal events available in Leadville
  - Costs of a trip that are much lower than virtually all other destinations in Colorado.
- With “Staycations” an increasingly viable, attractive option for travelers, Leadville and Lake County should be promoted as one of the most desirable staycation destinations within Colorado
  - Nowhere else can Colorado travelers discover so much and “get away from it all”- *and still be so close to home*
  - *Importantly, “staycation” instantly infers overnight visits - not day trips*

## Summary and Recommendations

- While the survey indicated the main reasons why Colorado travelers made their most recent overnight trip, additional analysis revealed the largest, most differentiated, most promising consumer segments for future targeting
  - Listed below, according to their size and relative importance

### Leading, Targetable Segments

1. Hikers (65%)
  2. Concert-Goers (58%)
  3. Campers (57%)
  4. History Buffs (57%)
  5. Outdoor/Nature Photographers (46%)
  6. Fishing (45%+)
  7. Sightseers (39%)
- Each of the targetable segments listed above *is not mutually exclusive* - within each segment individuals typically have several other activities and interests in mind
    - For instance, a majority of Hikers will also camp, some History Buffs might also be Concert-Goers many Photographers are Sightseers, etc., etc.
    - Instead of focusing only on singular activities or attractions, *travelers will be most motivated when they know there are many choices available and that they can enjoy a combination of several activities*
    - Rather than focusing only on generating a single, first visit, *the objective should be to give first-time visitors a multitude of reasons to return*

## Summary and Recommendations

- In order to increase tourism in the near-term, the most promising recommendation is to *create a single-source, centralized, main website where virtually all the web traffic flows*
  - Googling Leadville or Lake County brings up an assortment of websites for travelers seeking information, but too many of the websites currently available have missing information
  - In addition to seeing differing messages about Leadville and Lake County, several visitation websites are not populated with relevant information, are not updated regularly, and are lacking in offering important visitation information, on an ongoing basis
  - A “new & improved” [www.VisitLeadvilleCo.com](http://www.VisitLeadvilleCo.com) site should include as many links as possible to local attractions, including hotels, restaurants, and booking sites, as well as for local special events
  - Visitors to Leadville who have had positive experiences should be encouraged to go online, blog, and post messages on travel websites about their experiences
- Recommendations for additional short-term improvements to build tourism are:
  1. Prioritize construction of a new or expanded visitor’s center, maintained by knowledgeable local volunteers or students who are fully-trained and supervised
  2. Improve the number and quality of photos and images on existing websites, including websites for local hotels, Bed & Breakfasts, vacation homes, restaurants, and attractions
  3. Initiate new, collaborative relationships with Colorado Mountain College, offering several student internships for additional marketing development and support that is sorely needed
  4. Increase the number of historic plaques and signs available to the visiting public, to help create perceptions that a large assortment of interesting, historic buildings and locations exist
  5. Print much better local town maps and trail maps, highlighting all local bicycle and running trails, their level of difficulty, elevation changes, the average duration of trips, including overlays of both the Leadville 100 running and bicycle routes
  6. Engage local businesses in the efforts being put forth to improve tourism, ensuring that local workers who are in contact with the visiting public are friendly and more knowledgeable about local attractions and events so they can make recommendations.

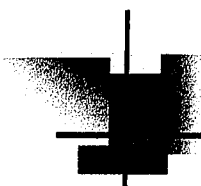
## Summary and Recommendations

- Leadville, Lake County, and its individual facilities should continue to take advantage of their “highest altitude” designations
  - For instance, Mt. Massive could easily sponsor an annual July 4<sup>th</sup> long distance driving competition, attracting golfers who are anxious to hit their longest drive in the rarefied air - and maybe set a world record
  - A highly targetable subsegment of endurance athletes and individuals seeking to attain personal bests in long distance runs, triathlons, and bicycling events can be attracted for the highest-altitude training available - fully *two miles* high
- Given the recent success of the 2011 Pro Cycling Challenge in Colorado, a very strong application should be submitted to name Leadville as a stop on the 2012 Tour
  - Applications are due October 31<sup>st</sup> at [www.usaprocyclingchallenge.com](http://www.usaprocyclingchallenge.com)
  - Locations chosen for the 2012 Tour are certain to experience very high *visibility* and *visitation*
- Consideration should also be given to making a concerted effort to attract movie film crews to locations in Leadville and Lake County
  - While this might be considered a “long shot,” serious efforts are already being made to attract film crews to other Colorado locations
  - Travelers are always intrigued when they can have experiences at locations seen in popular films, such as The Stanley Hotel in *The Shining* and scenery or backdrops featured in such films as *True Grit*, *Butch Cassidy and the Sundance Kid*, *The Unsinkable Molly Brown*, and many others
  - Wouldn't it be great to see some Leadville and Lake County locations in a new film?



## Summary and Recommendations

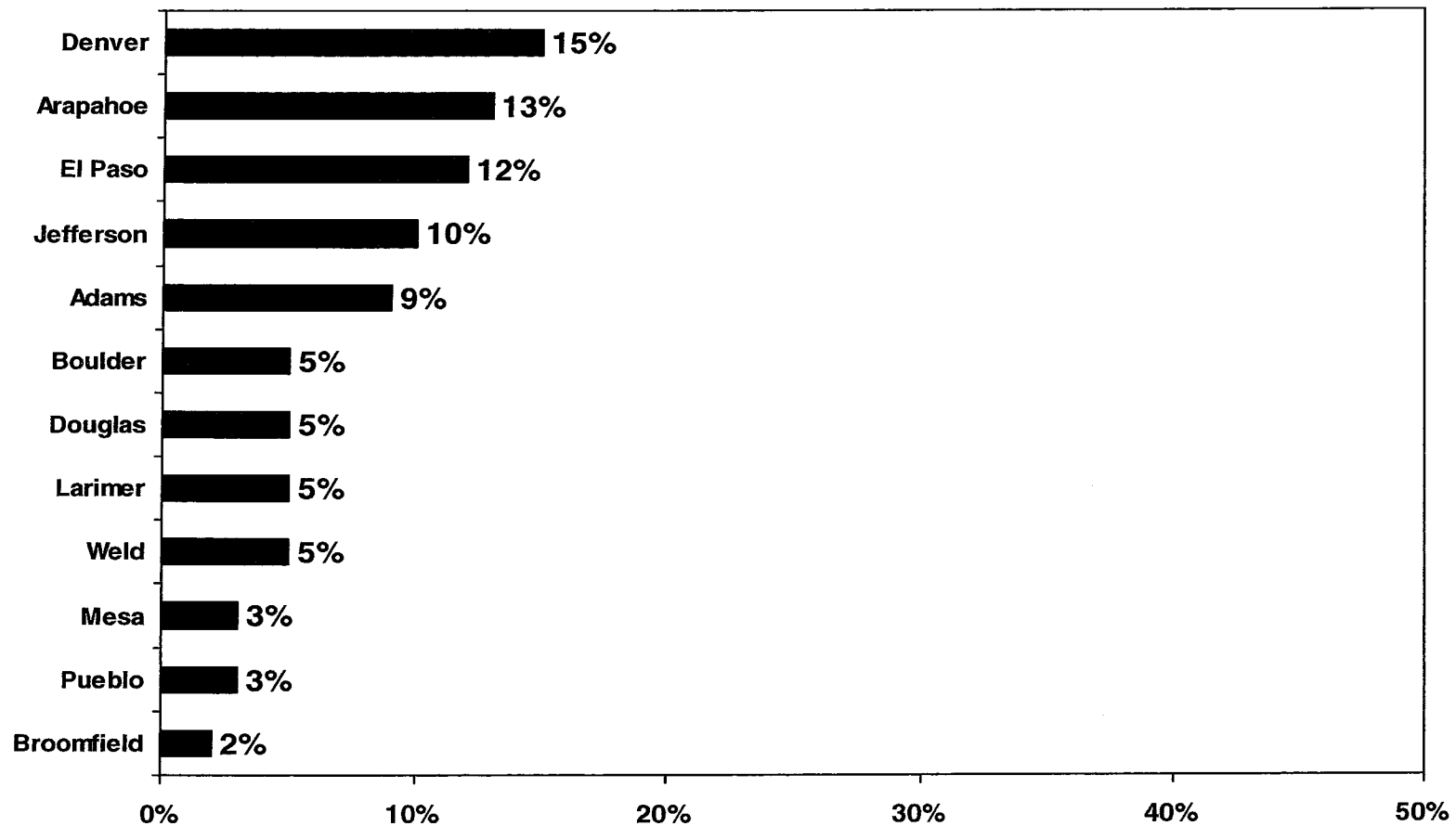
- Recommended measurements for tracking future Lake County tourism include:
  1. An annual survey among Colorado travelers, to include measurements of awareness, degree of consideration and any prior visitation of Lake County, along with interest in local activities, events, and attractions.
  2. Website traffic counts to all relevant visitation websites, including hits, duration on each site, and any available tracking of booking reservations to local hotels, events, or attractions.
  3. Overnight visitation, including available measurements for nights in local hotels, Bed & Breakfasts, and home rentals.
  4. Revenue trends from local attractions, retailers, and restaurants.
  5. Yearly, updated measurements of total visitation spending in Lake County, available from reputable sources such as Dean Runyan Associates, Longwoods International, or the State of Colorado.
  6. Skier visits at Ski Cooper.
  7. School enrollments, including trends at Colorado Mountain College.
  8. Local statistics and economics such as resident population changes, employment, and trends in real estate such as home sales, home values, time on the market, home rental activity, and vacancy rates.
- While all the above measurements may not be readily available from all of the sources identified, Leadville and Lake County will be creating much more of a local climate for *expecting a pattern of continuous improvements and positive longer-term trends*



# **Appendix**

## **Demographics of Lake County Survey Respondents**

## Lake County Travel Survey: County of Residence



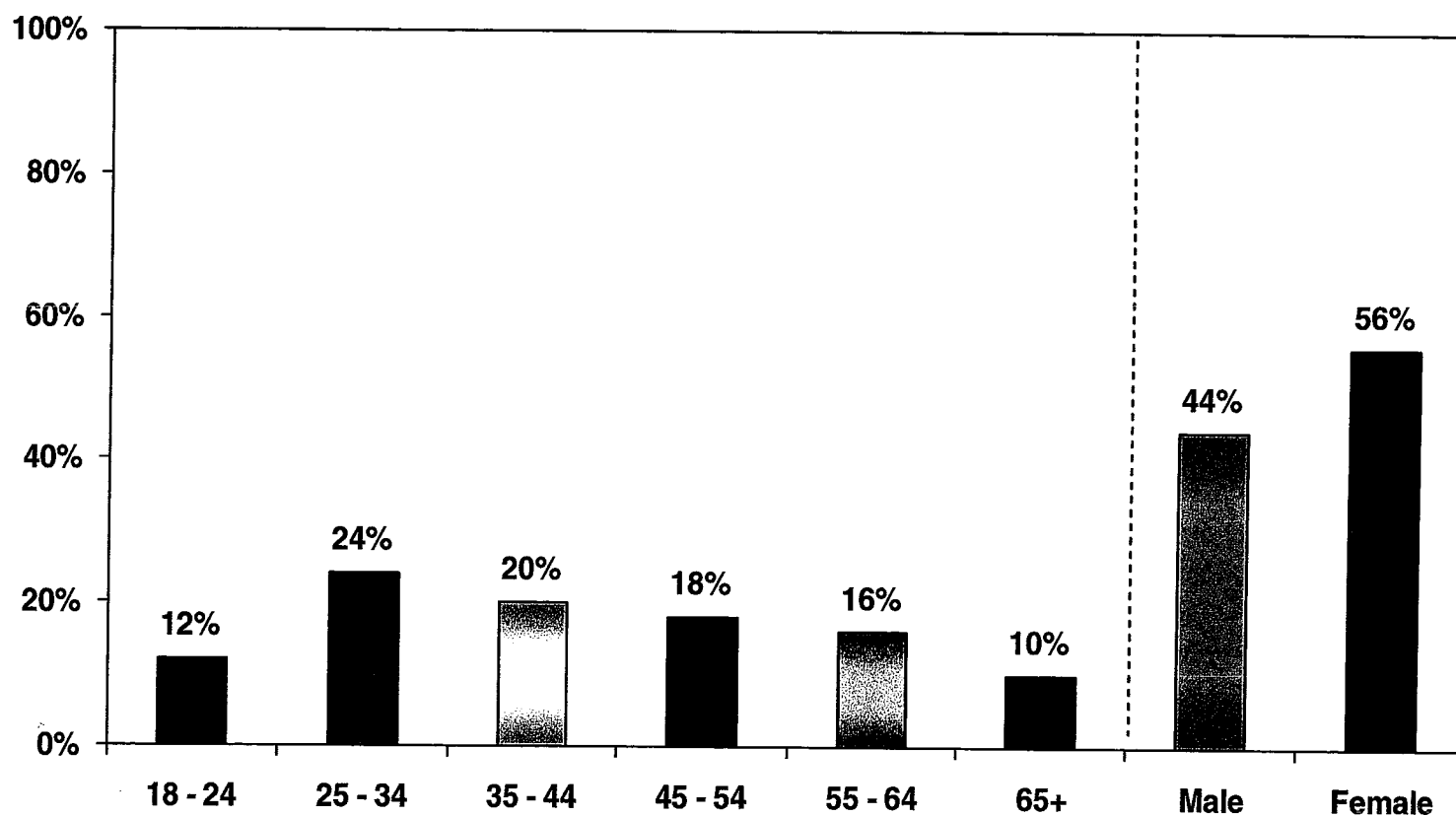
QB



*"Other Counties" response not charted.*

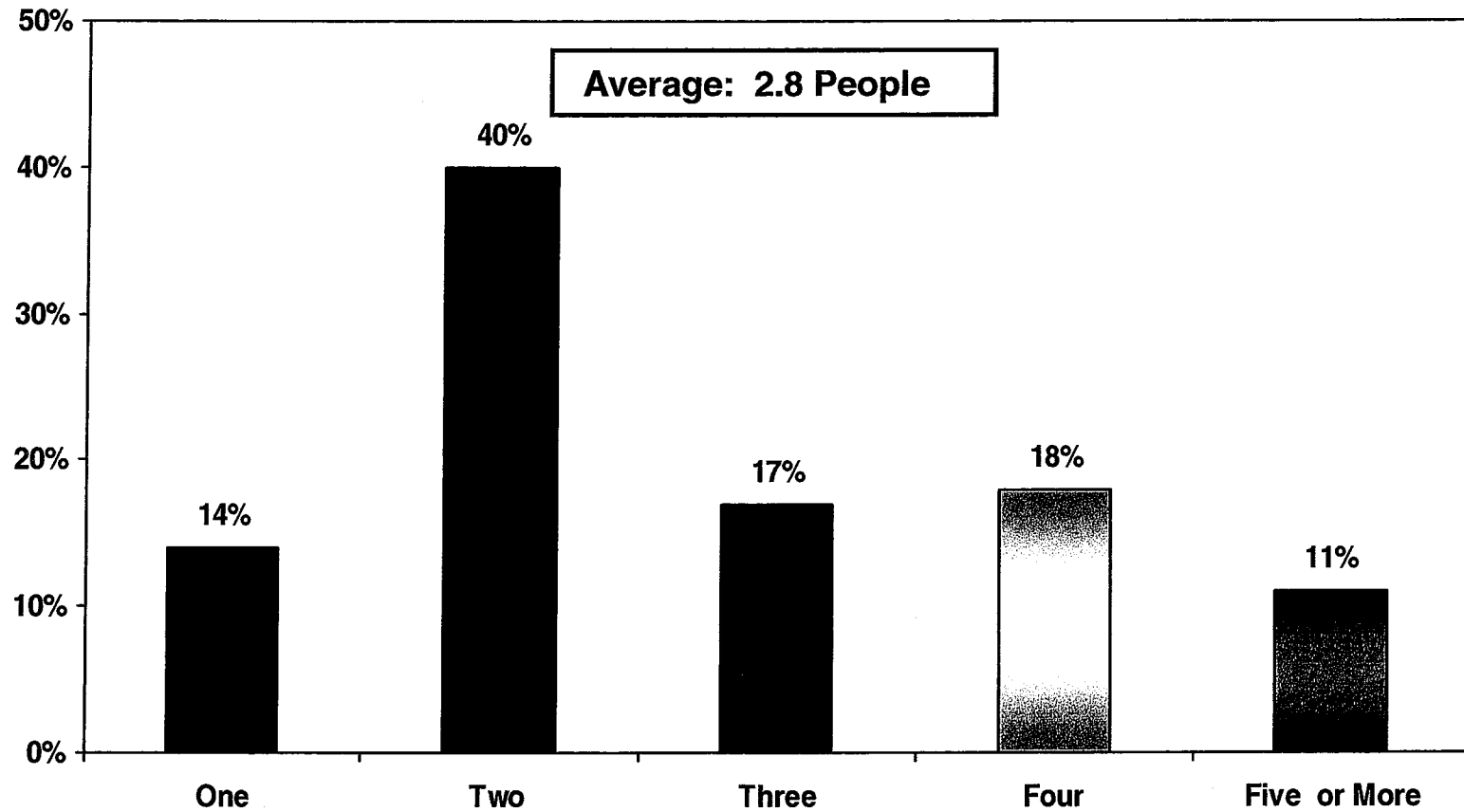


## Lake County Travel Survey: Age Groups and Sex



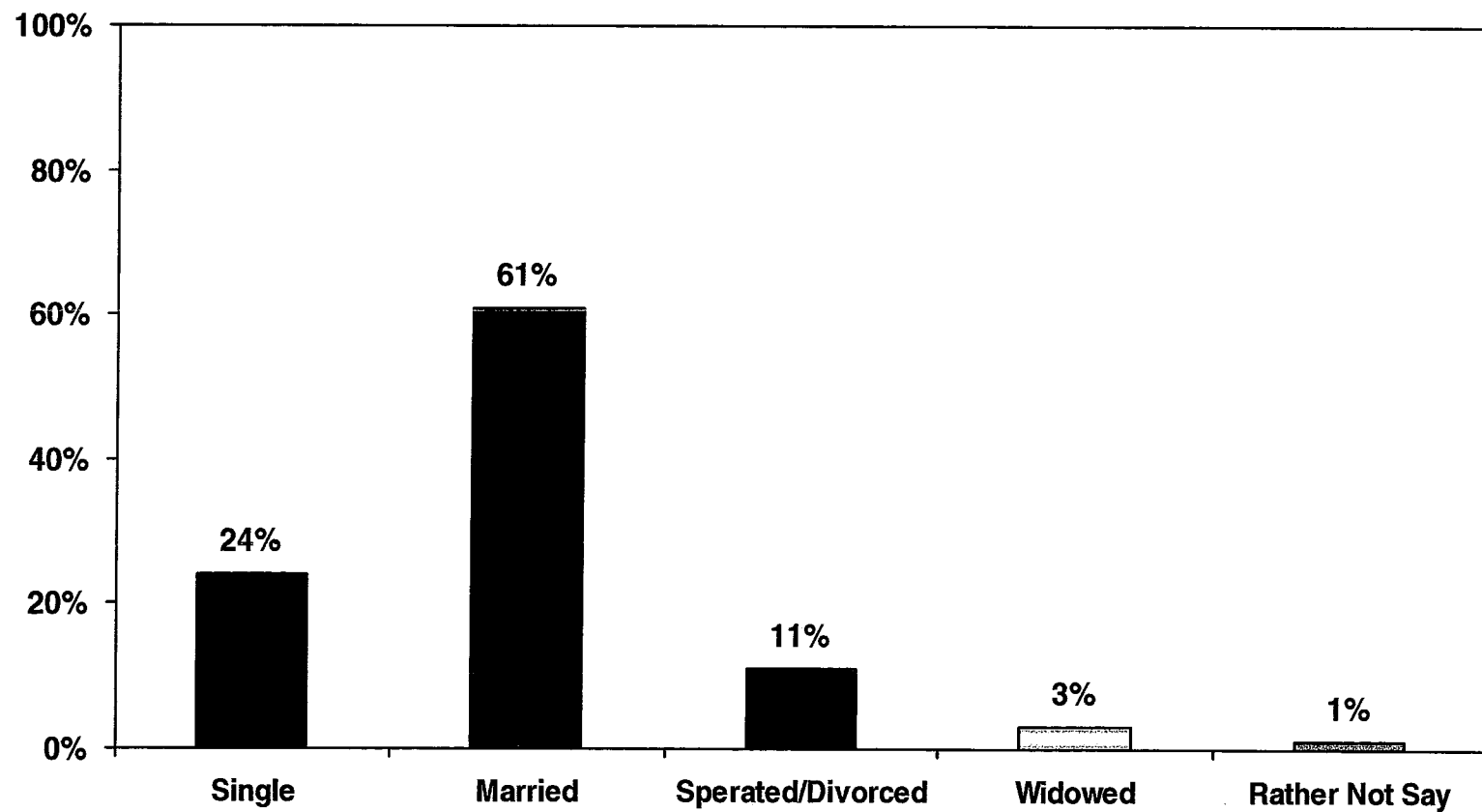
QC, QD

## Lake County Travel Survey: Household Size



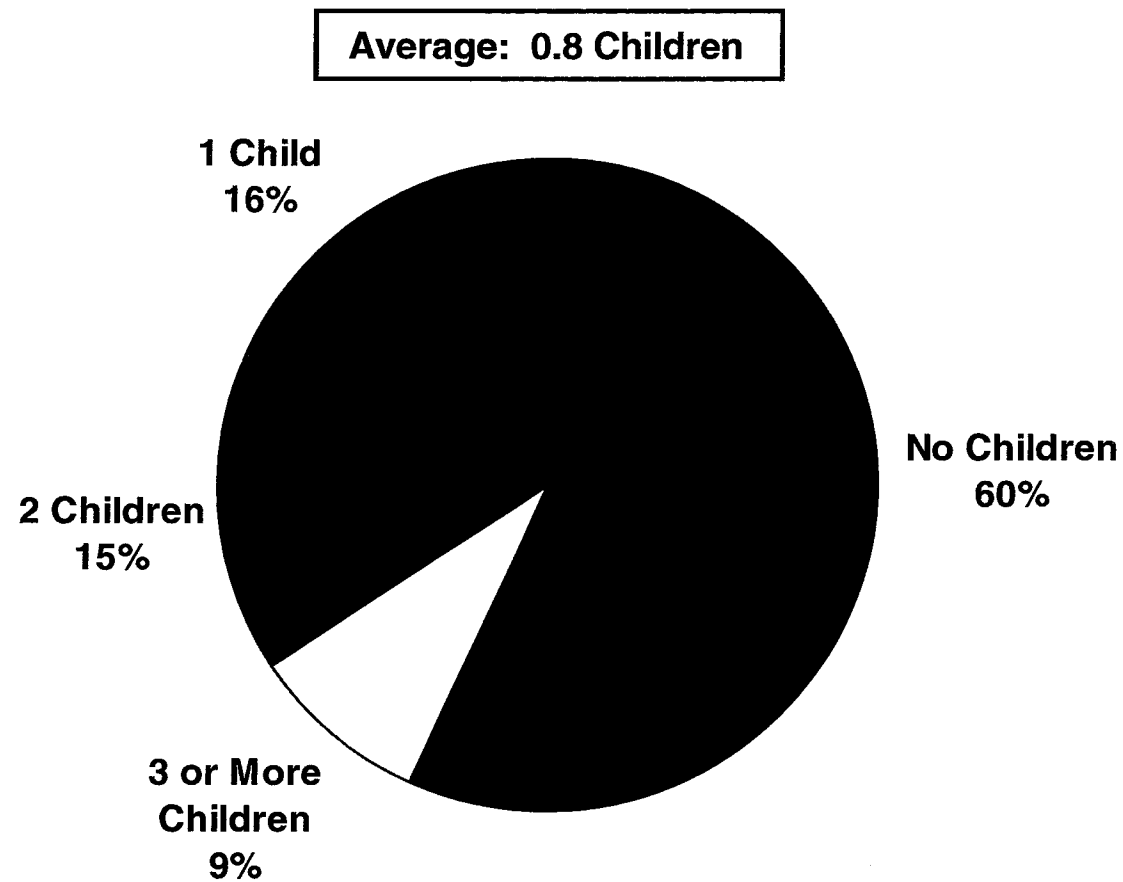
D1

## Lake County Travel Survey: Marital Status



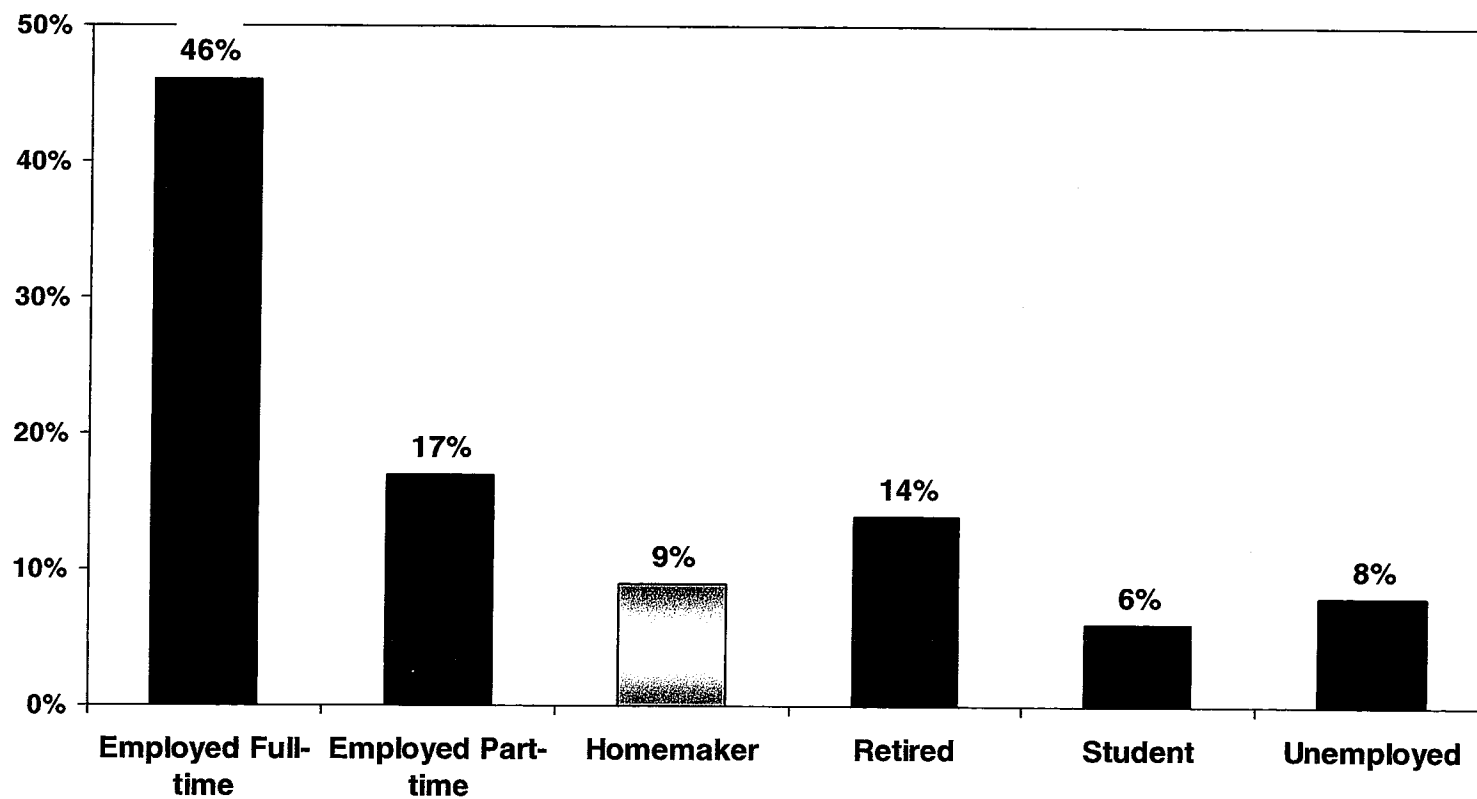
D2

## Lake County Travel Survey: Children <18 In Household



D3

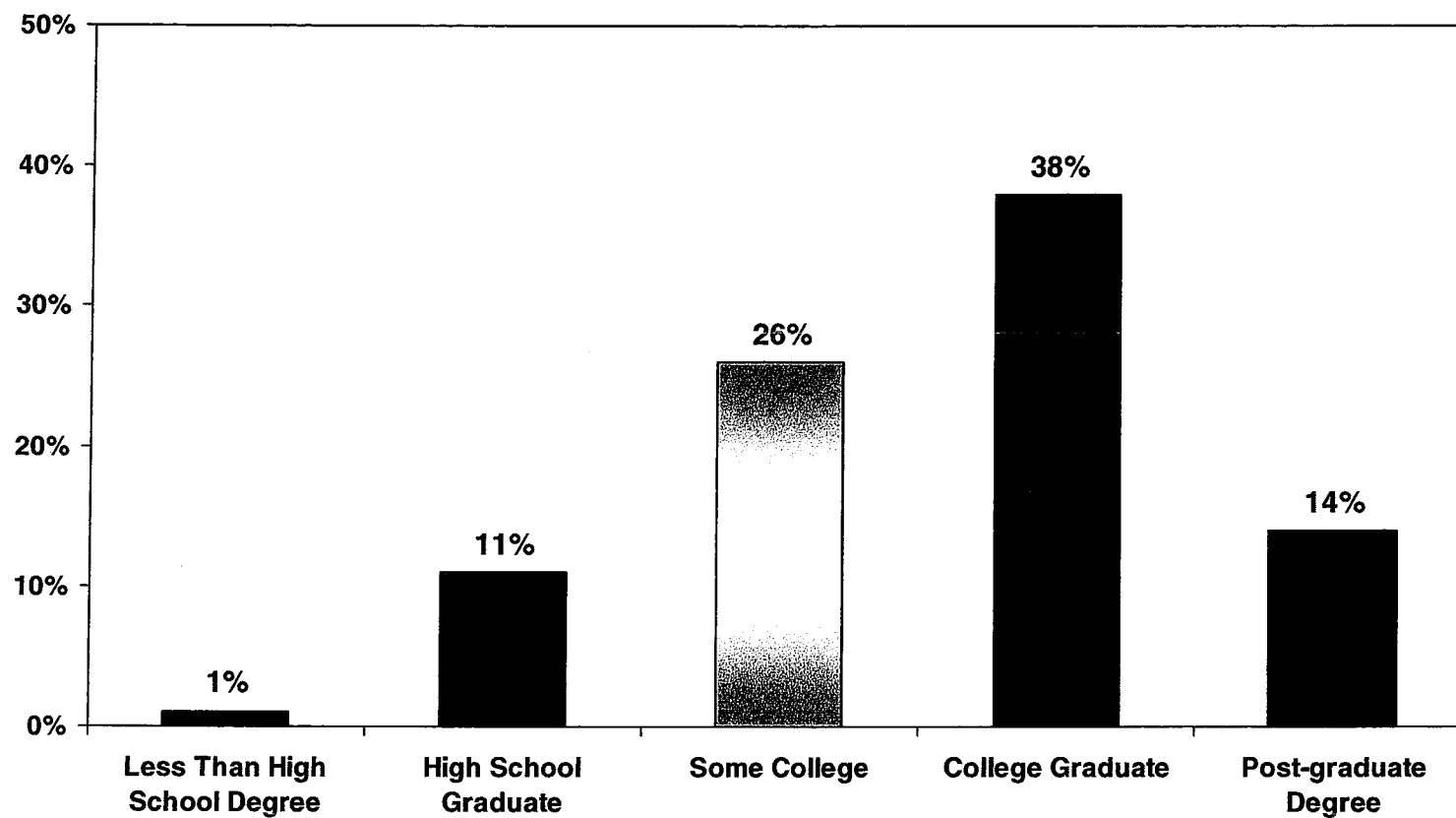
## Lake County Travel Survey: Employment Status



D4

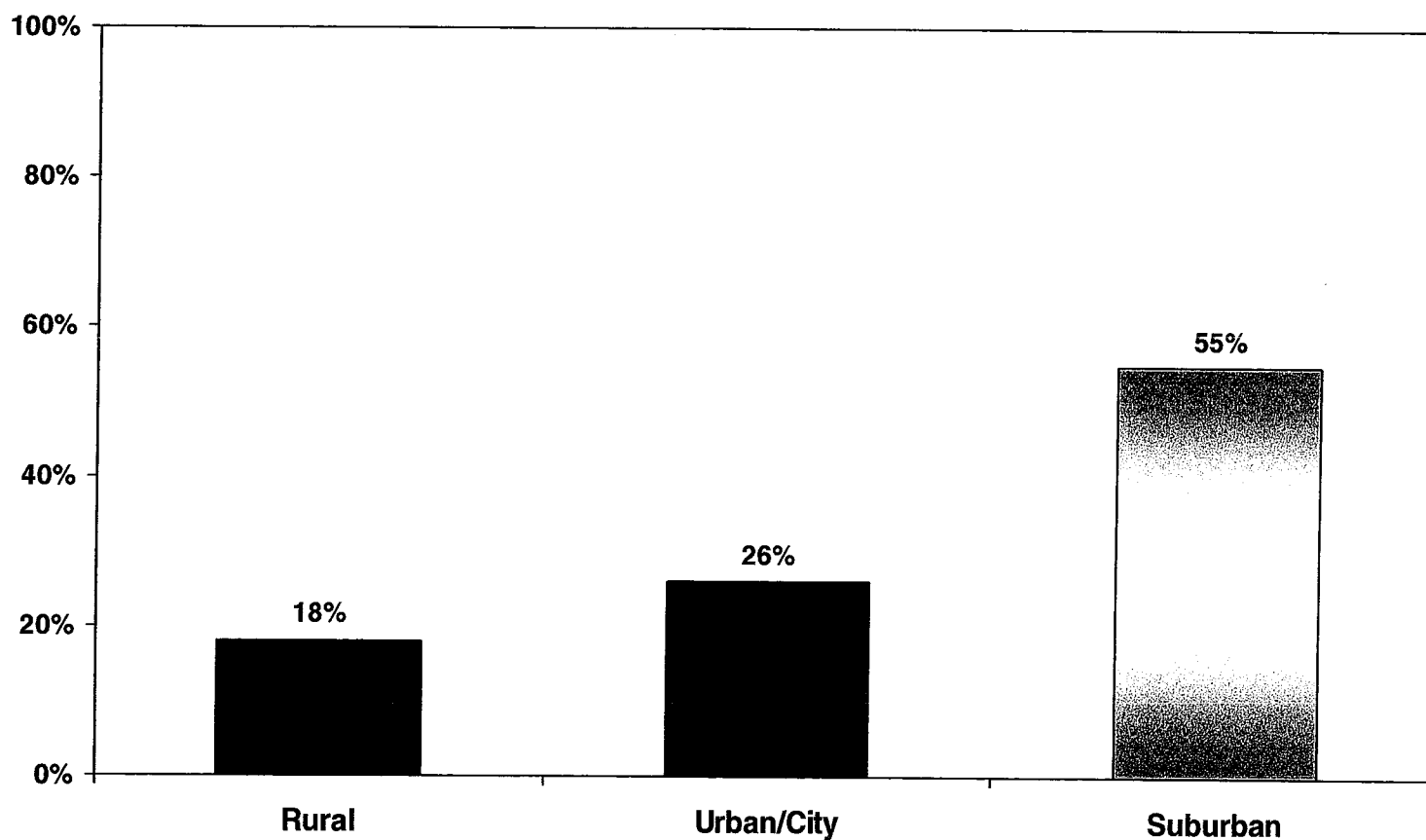


## Lake County Travel Survey: Education



D5

## Lake County Travel Survey: Setting of Residence



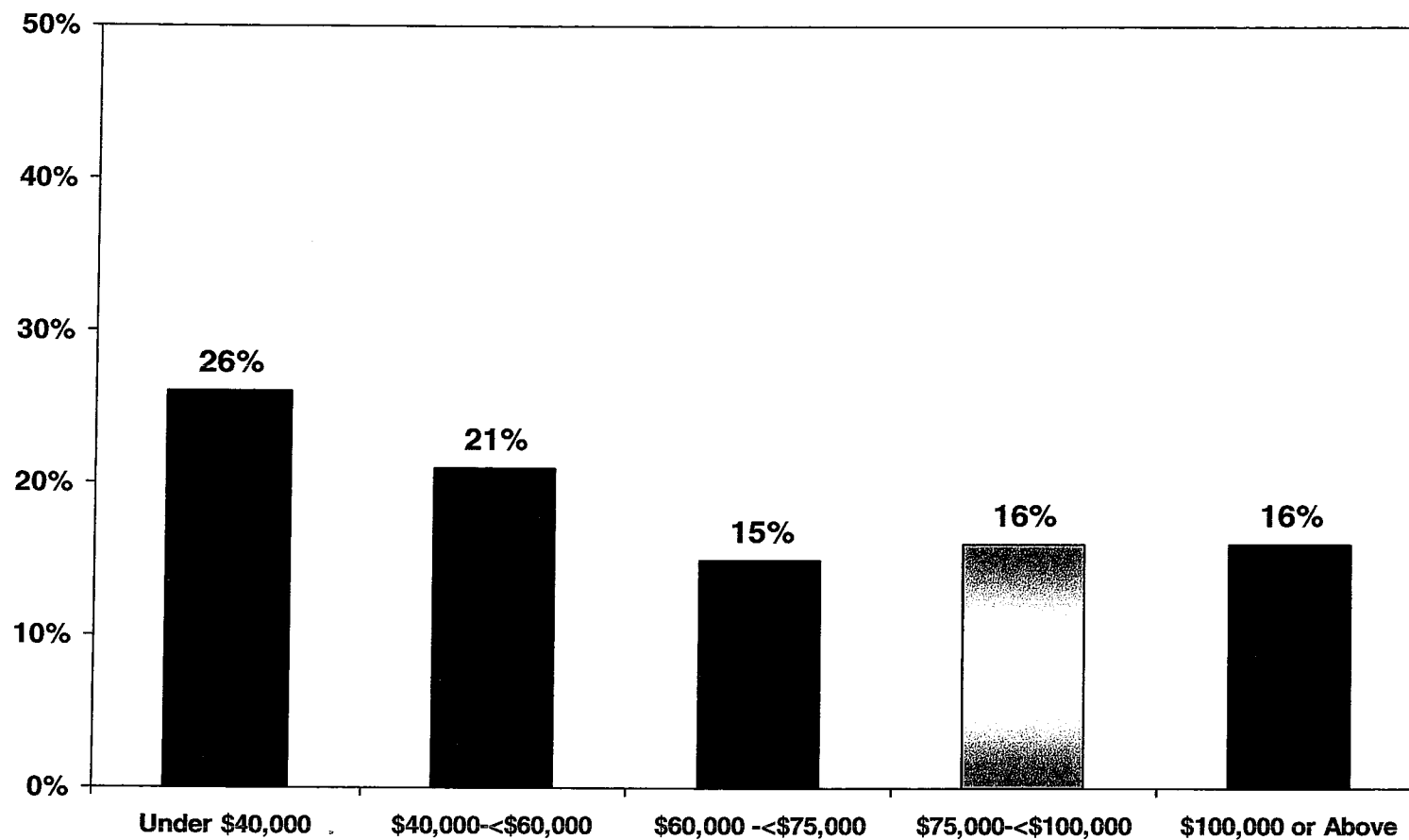
D6



1% Not Sure response not charted.



## Lake County Travel Survey: Household Income



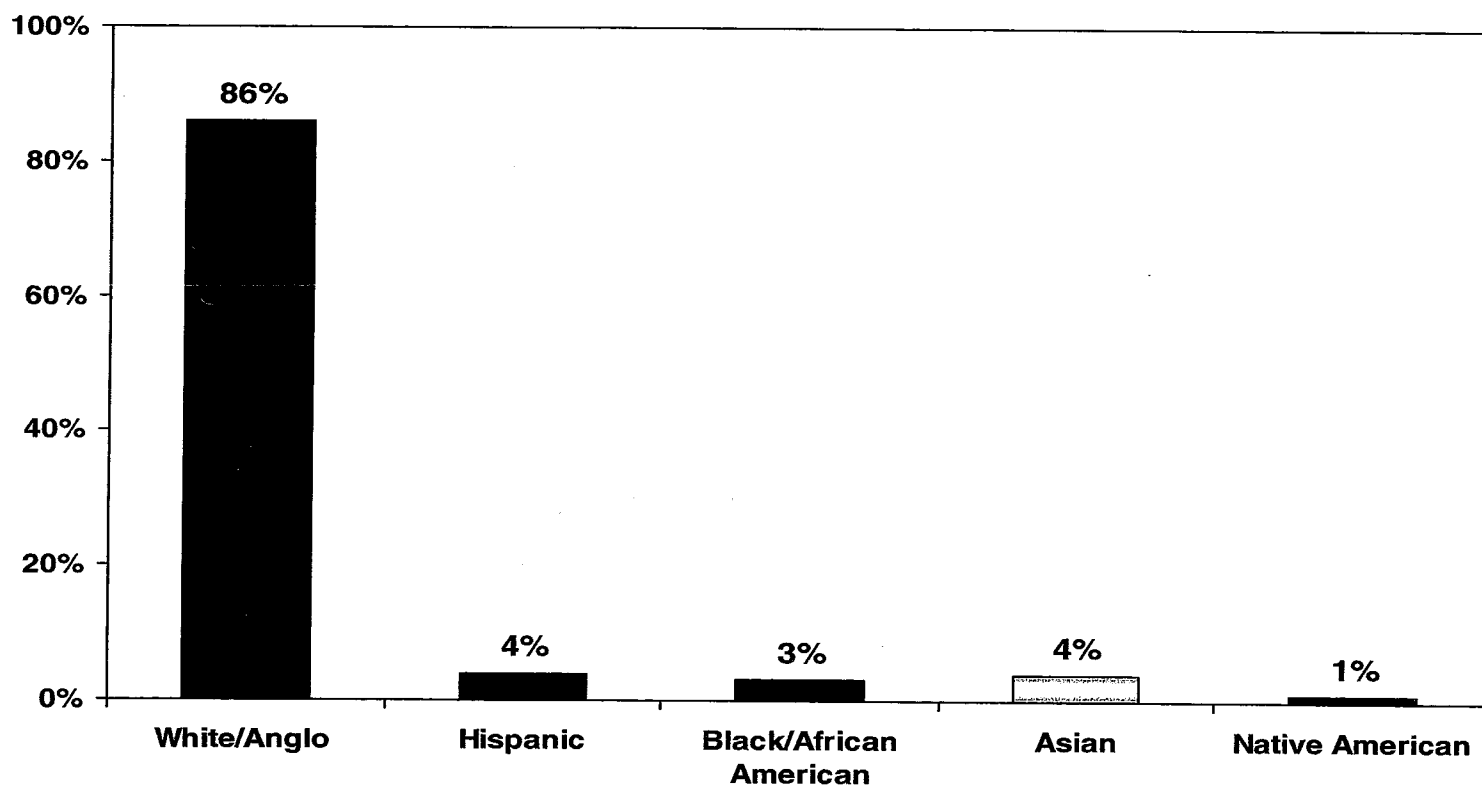
D8



*Don't Know responses of 6% not charted.*



## Lake County Travel Survey: Ethnicity



D9



*Other and Don't Know responses not charted.*

